

LEAD Brick Church  
Charter Application

For use by Achievement School District Charter Schools  
Applying to Tennessee Public Charter School Commission  
Opening in the 2024-2025 School Year

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# GENERAL INFORMATION

Name of ASD Charter School: LEAD Brick Church

Sponsor of the School (e.g. KIPP, Green Dot, etc): LEAD Public Schools

Name of Primary Contact Person: Adrienne Useted, Chief Strategy Officer

School Address: 2835 Brick Church Pike, Nashville, TN 37207

Primary Contact’s Telephone: 615-775-5254

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Does this applicant have charter school applications under consideration by any other authorizer(s), including the local board of education? (This is for contextual information only).

Yes X \_\_\_\_\_ No \_\_\_\_\_

If yes, complete the table below, adding lines as needed. Include any schools that the operator would be directly responsible for/include in the operator’s portfolio of schools.

State	Authorizer	Proposed School Name	Application Due Date	Decision Date	Proposed opening year
TN	MNPS	LEAD Southeast Elementary	2/1/2024	4/23/2024	25-26
TN	MNPS	LEAD Cameron Elementary	2/1/2024	4/23/2024	25-26

Indicate Applicant Type:

An ASD-authorized school allowed to apply to the Charter Commission based on the determination of the Commissioner of Education under T.C.A. § 49-1-614(k)(2)(B).

An ASD-authorized school allowed to apply to the Charter Commission by meeting the priority exit criteria set forth in the state’s accountability model under T.C.A. § 49-1-614(k)(4).



## ASSURANCES

As the authorized representative of the charter school, I hereby certify that the information submitted in this application for a charter for LEAD Brick Church 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 award; and if awarded a charter, the school:

1. Will operate as a public, nonsectarian, non-religious public school, with control of instruction vested in the governing body of the school under the general supervision of the authorizer and in compliance with the charter agreement and the Tennessee Public Charter Schools Act;
2. Will follow all federal, state, and local laws and regulations that pertain to the operation of a public school, unless waived according to T.C.A. § 49-13-111(p);
3. Will provide special education services for students as provided in Tennessee Code Annotated Title 49, Chapter 10, Part B of the Individuals with Disabilities Education Act; Title II of the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973;
4. Will adhere to all provisions of federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974, that are applicable to it;
5. Will follow all federal and state laws and constitutional provisions prohibiting discrimination on the basis of disability, race, creed, color, national origin, religion, ancestry, or need for special education services;
6. Will utilize this application as a contract with the authorizer, if no other agreement is signed, pursuant to Tennessee Attorney General Opinion No. 10-45;
7. Will comply with all provisions of the Tennessee Public Charter Schools Act, including, but not limited to:
  - a. employing individuals to teach who hold a license to teach in a public school in Tennessee;
  - b. complying with Open Meetings and Open Records laws (T.C.A. §§ 8-44-101 et seq.; 10-7-503, 504) (guidance is available from the Office of Open Records Counsel);
  - c. not charging tuition;
  - d. following state financial (budgeting and audit) procedures and reporting requirements according to T.C.A. § 49-13-111, 120, and 127;
  - e. requiring any member of the governing body, employee, officer, or other authorized person who receives funds, has access to funds, or has authority to make expenditures from funds, to give a surety bond in the form prescribed by T.C.A. § 8-19-101; and
8. Will, at all times, maintain all necessary and appropriate insurance coverage.

*Dwayne H. Tucker*

Signature:

Printed Name of Authorized Representative: Dwayne Tucker

Title of Authorized Representative: Chief Executive Officer



# SECTION 1: ACADEMIC PLAN DESIGN AND CAPACITY

## 1.1 School Mission

*In this section:*

- (a) *Provide the mission statement for the charter school.*
- (b) *Discuss the ways the school has progressed towards its mission under the ASD and also address any challenges to achieving the established mission and how the operator plans to overcome these challenges.*
- (c) *Provide past academic data and examples of fulfillment of the school's mission in alignment with TN state assessment data or internal assessment data (Ricki & MLM).*



LEAD Brick Church's mission is to prepare all students for college and life. Our middle school serves a zoned population in grades 5 through 8 in the Whites Creek region of Nashville, with an emphasis on college preparatory and personalized learning for all students in our care. As a whole, LEAD Brick Church's educational program can be summarized by the vision for effective teaching honed and practiced by all staff. At LEAD Brick Church, effective teaching means facilitating data-driven, student-centered work that is balanced by both rigor and love and supported by a strong classroom culture and high expectations.

LEAD Brick Church's founding mission was to support, train, and educate the next generation of responsible citizens. From the beginning, we have emphasized academic growth and student support services as a means of developing well-rounded scholars. Over the past 12 years, the mission has evolved to a more comprehensive focus on *preparing all of our students with the knowledge and skills to succeed in college and in life*. While not radically different than the founding mission, the current mission statement reflects our emphasis on all-means-all; every student who comes to LEAD Brick Church, no matter what their needs or educational level, will leave the school prepared for the rigors of life and equipped with the social/emotional skills to succeed in and out of school.

LEAD Brick Church's core values are embodied in the school's Ethos, comprising five components: courage, commitment, discipline, self-reliance, and service to others. All of the school's programming—both academic and cultural—is built on the LEAD Brick Church Ethos. Students and adults are expected to exemplify these values in everything they do.

Our educational model is built on the belief that all students can excel when given the right opportunities and support. Since we believe and research demonstrates that mastering academic standards sets students up for

success in life, students at LEAD Brick Church spend extra instructional and small group time focused on literacy and numeracy development as we work to close academic gaps and ensure all of our learners are ready for college and life. Students learn rigorous, standards-aligned content based in research-proven curricula designed to enhance problem-solving and critical thinking skills necessary for college- and career-readiness. Students recognize the rigor at our school, with 78% reporting on our most recent student survey that “ALL of my teachers have high expectations” and 74% of students agreeing that their school is challenging.

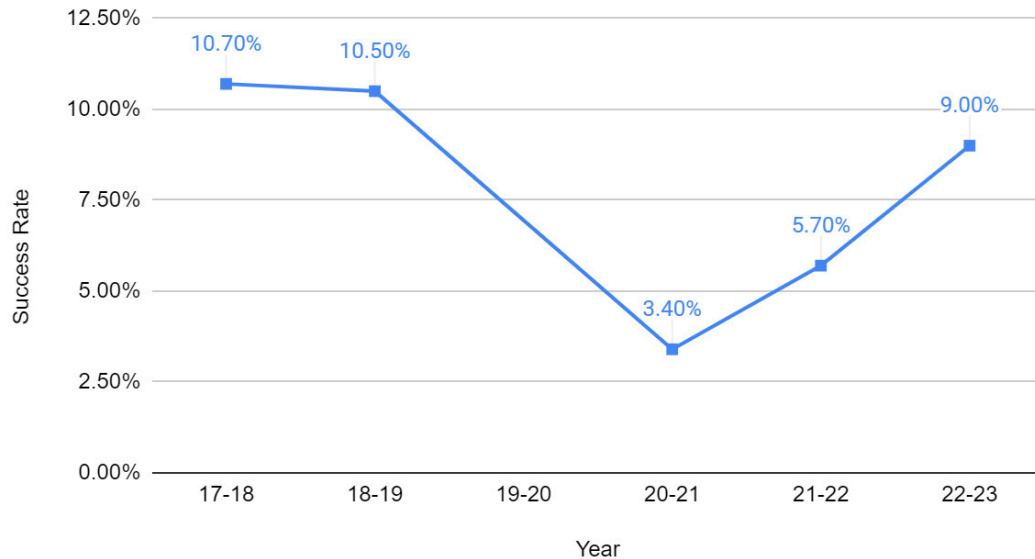
An effective educational environment is not limited to academics; LEAD Brick Church emphasizes the social and emotional development of every student as well. The foundation for this growth begins with the strong relationships that our teachers build with our students to create the space for social-emotional growth. School culture feedback has shown that LEAD Brick Church is a place where students are developing strong relationships with adults. Seventy-eight percent of LEAD Brick Church students agree that, “I have an adult in the school I know I can trust” and 86% agree that, “My teachers believe in me”. In addition to the relationships that our teachers build with their students in our core content classes, we have a specific focus on social-emotional development through our CREW structure. Every student at LEAD Brick Church is part of a CREW, a small group of 15-20 students paired with one teacher for lessons on character traits, recent events, executive functioning skills, and real life reflection. CREW is also a place where teachers do academic and wellbeing checks on their students to ensure that students’ needs are addressed as a whole child.

We have also focused on creating a learning space that is respectful of student backgrounds, culturally responsive, and supportive of all student needs. We have developed a cultural model that includes trained counselors on staff and a robust culture team, led by an assistant principal of students who works with support staff to bring joy and discipline to our school. Additionally, we have a dedicated staff member in our family and community engagement coordinator who works with families and neighborhood partners to make sure that we are seeking and acting upon input from all of our stakeholders. The family and community engagement coordinator at LEAD Brick Church has an active Family Leadership Council who contributes to our school improvement plan creation, Title I spending, various school-level events, and consistently meets with the principal to discuss how parents and the community can play a major role in supporting our school.

Another critical component of our values is standing by our families and local community. During the past twelve years, the local school district has closed and consolidated many of the local public elementary and middle school options in the neighborhood. Despite this, Brick Church has remained a consistent presence in the community and a safe place for students to learn and be loved. In addition, Brick Church continues to be the highest performing zoned middle school in its geographic region, providing a strong option for families.

Since its founding in 2012, LEAD Brick Church has made progress towards achieving its mission to ensure students are equipped with the knowledge and skills to succeed in college and in life. Prior to the pandemic, LEAD Brick Church achieved above average student growth, earning Level 4 TVAAS in 2017-2018 and Level 5 TVAAS in 2018-2019. The pandemic posed significant challenges for our students, as evidenced by both falling achievement and a growth score of Level 1. Since the pandemic, our school has made steady gains in academic performance, with success rate steadily climbing from 3.4% to 5.7% to 9.0%. Ultimately, Brick met priority exit criteria in the 2022-23 school year. Brick joins Neely’s Bend and Cameron as the third school LEAD has transformed to improve academic performance. This also marks a historic achievement in our partnership with the Achievement School District (ASD) as LEAD has now successfully moved both Nashville ASD schools off the priority list.

## Success Rate



While pleased with our progress toward our mission, there are a number of challenges that remain in regards to fully realizing our promise of preparing students for college and life. Our students have not yet recovered their proficiency levels from the pre-pandemic years and, while growth is strong, we must accelerate our students' absolute success rate in order to ensure that all students are prepared for college and career. Brick Church has made numerous investments in the past several years, including staffing model changes, revised curricula, a strong coaching model, and enhanced support from the network. These investments are showing promising results from internal data, giving us confidence that Brick Church students will continue to see increased proficiency over the next charter term. Please see section 1.4 below for a detailed analysis of Brick Church's past data and our approach to continuing an upward trajectory of academic results to meet our mission.

LEAD Brick Church does not face these challenges alone; instead, it is supported by full resources of the LEAD Public Schools network. LEAD has a proven track record of delivering on its mission to prepare students for college and life and has been a key partner in closing the achievement gap in Davidson County for the past 15 years. Most relevant to LEAD Brick Church, LEAD has developed an expertise in school turnaround work. Turnaround work highlights include:

- LEAD became the first turnaround operator in the state of Tennessee by engaging with MNPS in the first charter conversion process of LEAD Cameron in 2011.
- LEAD has successfully moved two schools, LEAD Cameron and LEAD Neely's Bend, out of the bottom 5% performing schools in achievement in Tennessee.
- LEAD has achieved priority exit status for both LEAD Neely's Bend and LEAD Brick Church.
- LEAD is the only operator of Achievement School District schools in Middle Tennessee and was included in the inaugural cohort of ASD Schools in 2012.
- LEAD is the only charter operator in the state to have expertise in operating within three school authorizers (Metro Nashville Public Schools, Tennessee Public Charter School Commission, and Achievement School District).
- LEAD has multiple school and network leaders with significant turnaround expertise in both charter and traditional public schools. These leaders include Kathryn Rice McKinzie, Brick Church

Principal; Ricki Gibbs, Head of Elementary Schools; Tait Danhausen, Head of Middle Schools; LaVoe Mulgrew, Head of High Schools; Tony Majors, Chief Operating Officer; Adrienne Useted, Chief Strategy Officer; and several of LEAD's content leads at the network level.

Beyond turnaround work, LEAD is also driving results across its network of schools. Examples of historical success include, but are not limited to, the following:

- LEAD Public Schools was identified as a “gap buster” in both reading and math for closing achievement gaps by Stanford Credo’s National Charter School Study 2023<sup>1</sup>, in addition to evidencing strong positive growth results in both reading and math.
- Since assuming the charter in 2011, Cameron has been a TVAAS Level 5 school for overall growth every year. In addition, Cameron has been named a Reward School for top academic growth three times: 2013-14, 2016-17, and 2017-18.
- With the exception of 2020-21 (a hold harmless year heavily influenced by the pandemic), LEAD Southeast has been a Level 5 school for overall growth every year since assuming the charter in 2012 and was named a Reward School for top academic growth in 2014-2015 and 2016-2017.
- In 2022, LEAD Neely’s Bend was the first ASD school located in Nashville to exit the priority list.
- Graduation rates for LEAD Academy (90%) and LEAD Southeast (93%) reported for 2022 are higher than the district average of 82% and the state average of 88.7%.
- LEAD has been recognized for its innovative employee value proposition, approach to teacher and leader development, and related compensation model and was awarded multiple rounds of the Teacher and School Leader (TSL) Grant by the U.S. Department of Education.

Emerging from the pandemic, LEAD has seen significant growth across its network of schools. Of TVAAS scores earned in the past two school years, 86% have been at a Level 3, 4, or 5 with 61% at Level 5. Of particular note was the elevation in TVAAS scores at LEAD Academy from 2021-22 to 2022-23. At this school, we were concerned by the Level 1 performance in 2021-22 and underwent a “Drive to 5” campaign across the school to raise TVAAS scores. The Drive to Level 5 Campaign focused on the prioritization of high-quality standards-based instruction, extended learning opportunities and enrichment, the use of data to identify students current performance levels and learning needs, the reduction of chronic absenteeism, and incentivising student and staff engagement, which promoted a culture of learning and celebration. While we did not quite reach our goal by scoring a Level 4 composite in 2022-23, we did succeed in raising TVAAS scores in every domain and, as a result, saw an almost five percentage point increase in school success rate. This is an example of the targeted approach our network takes to quickly address lagging indicators.

LEAD Brick Church stands to benefit from the strength of our network and our track record of success. Brick’s position as the lowest performing school in our network in terms of proficiency means that our network has prioritized supports for this school. Our academic team and head of schools team are currently providing enhanced support to Brick Church, which is only possible because of the relative strength of our other schools. Brick Church also benefits from learning what has worked with other schools. An example of this collaboration is our monthly school principal and assistant principal of instruction convenings. During these meetings, instructional leads spend time problem solving the unique challenges

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<sup>1</sup><https://ncss3.stanford.edu/wp-content/uploads/2023/06/Credo-NCSS3-Report.pdf>

of their schools with experienced instructional leaders across our network. The LEAD network is deeply committed to seeing increased results for Brick Church over time.

#### LEAD Public Schools TVAAS Performance

School	Year	Composite	School Wide Literacy	School Wide Numeracy	School Wide Lit & Num	School Wide Science	School Wide SS
Brick Church	2022-23	3	3	2	3	5	3
Brick Church	2021-22	5	4	5	5	2	5
Neely's Bend	2022-23	5	5	4	5	4	4
Neely's Bend	2021-22	5	3	5	5	5	3
LEAD Southeast Middle	2022-23	5	1	5	5	5	5
LEAD Southeast Middle	2021-22	5	4	5	5	4	4
LEAD Southeast High	2022-23	5	5	5	5	5	5
LEAD Southeast High	2021-22	5	5	3	5	5	5
LEAD Cameron	2022-23	5	3	5	5	5	5
LEAD Cameron	2021-22	5	5	5	5	5	5
LEAD Academy	2022-23	4	5	2	3	NA	3
LEAD Academy	2021-22	1	2	1	1	2	1

We understand that growth does not tell the full story, and in order to deliver on our mission, we must also see strong student achievement. All LEAD schools increased their success rate from 2021-22 to 2022-23.

#### LEAD Public Schools Success Rate Performance

Success Rate	2021-22 Success Rate	2022-23 Preliminary Success Rate <sup>2</sup>
Cameron	11.9%	12.9%
Brick Church	5.7%	9.0%
Neely's Bend	10.3%	11.2%
Lead Southeast (Combined)	19.5%	24.3%
Lead Academy	15.4%	19.2%

The table below outlines middle school students' progress towards proficiency in each grade and subject level.

<sup>2</sup> All 22-23 TNReady data contained within the application represents the most updated information available from the TDOE or or authorizers as of 12/6/2023. Some data is preliminary as we await final state calculations.

LEAD Public Schools Proficiency by Subject Area and Chronic Absenteeism Results

	English Language Arts	
School Year	2021-22	2022-23
Brick Church	5.80%	6.91%*
Neelys Bend	10.40%	11.10%
Cameron	11.50%	12%
LSE (Combined)	21.50%	23%
Academy	17.10%	23%
	Math	
School Year	2021-22	2022-23
Brick Church	5.80%	9.22%*
Neelys Bend	10.50%	9.88%
Cameron	11.80%	14%
LSE (Combined)	16.10%	21%
Academy	5.10%	10%
	Science	
School Year	2021-22	2022-23
Brick Church	4.10%	10.91%*
Neelys Bend	13.20%	14.70%
Cameron	18.70%	21%
LSE (Combined)	22.20%	40%
Academy	10%	33%
	Social Studies	
School Year	2021-22	2022-23
Brick Church	13.60%	10%*
Neelys Bend	18.30%	17.70%
Cameron	26.60%	25%
LSE (Combined)	34.40%	35%
Academy	8.10%	30%

	<b>Chronic Absenteeism</b>	
<b>School Year</b>	<b>2021-22</b>	<b>2022-23</b>
<b>Brick Church</b>	<b>29.40%</b>	<b>38.50%</b>
<b>Neelys Bend</b>	<b>39.40%</b>	<b>33.30%</b>
<b>Cameron</b>	<b>36.30%</b>	<b>34%</b>
<b>LSE (Combined)</b>	<b>22.70%</b>	<b>19%</b>
<b>Academy</b>	<b>42.00%</b>	<b>22%</b>

\* Data based on internal calculations from Pearson Access; still awaiting proficiency results from TDOE

## 1.2 Enrollment Summary

*NOTE: Any charter school authorized by the Charter Commission is an open-enrollment charter school where any eligible student within the geographic district in which the school is located may attend. Any charter school moving from the ASD would lose any defined attendance zone and would be open to any student within the geographic district.*

*In this section:*

- (a) As an open-enrollment charter school, describe the community from which the charter school intends to draw students, including the demographic profile and the school zones of the schools also in operation within the community. Note any changes to the community that the school will draw from if authorized by the Charter Commission.*
- (b) Discuss the academic performance and enrollment trends of existing schools in that community if your community is changing or expanding from what is currently served under the ASD.*
- (c) Describe the specific demographic population of students the school currently serves.*
- (d) Discuss how the school will address and maintain enrollment given the shift from a zoned school to an open enrollment school if authorized by the Commission.*
- (e) Complete the enrollment summary and anticipated demographics charts below (removing any extra grade levels as necessary).*

While LEAD Brick Church is a zoned school option for a single feeder elementary, LEAD Brick Church has already established a diverse, non-zoned pipeline of students. The primary elementary feeder school that is within this geographic priority zone is Alex Green Elementary, which accounts for 55% of our enrollment. We have a secondary enrollment zone that includes the following elementary schools: Joelton Elementary, Cumberland Elementary, Shwab Elementary, and Tom Joy Elementary; all of which we have established relationships with and have consistently enrolled students from. Additionally, we backfill our upper-level enrollment from Jere Baxter and Haynes Middle Schools.

Should the school be authorized by the Charter Commission and become an open enrollment charter school, we would anticipate a reduction in our zoned pipeline from Alex Green and, as a result, are already increasing our recruitment efforts among our four additional feeder areas that currently account for almost half our student

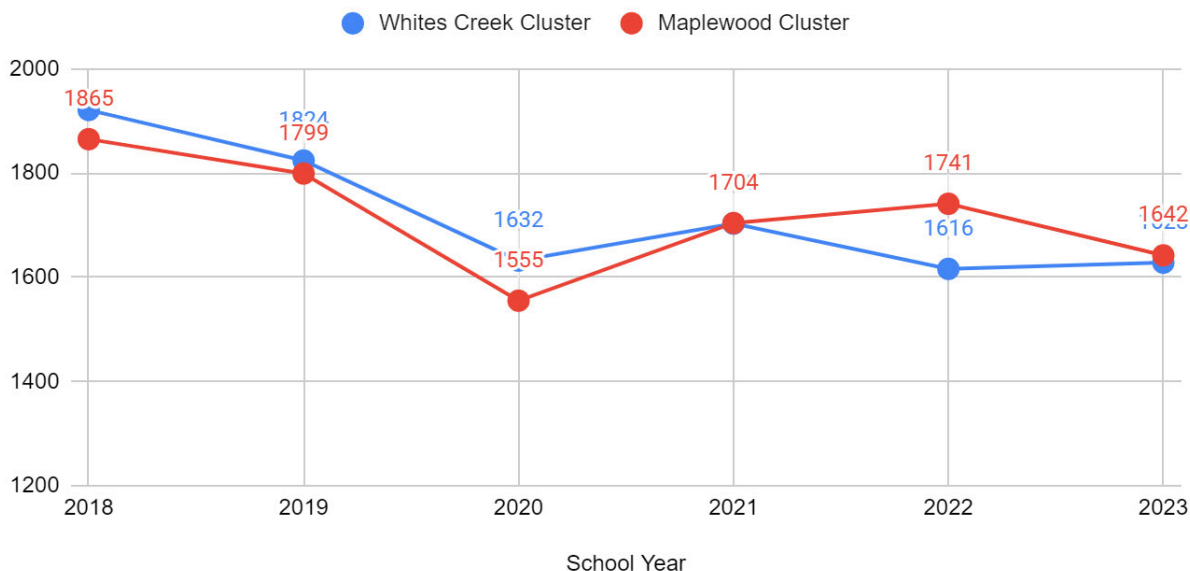


enrollment. We are also currently expanding our enrollment zones more broadly to include enrollment from Ida B. Wells and Chadwell Elementaries, both of which are also within the Maplewood High School Cluster and have not been targeted as a recruitment area for LEAD Brick Church in the past. We also anticipate that by increasing our recruitment efforts beyond our existing elementaries we may be able to attract some families who may currently choose other charter options. Finally, while enrollment across our cluster is currently stable, there are a number of apartment units recently built, or currently being built, in areas we currently recruit in. We are hopeful that these complexes will have families with children in our grade range, and we have already adjusted our transportation patterns to recruit in these areas.

Brick Church students come from both the Whites Creek and Maplewood clusters. Schools in these clusters have struggled with low academic performance. Of the five zoned middle schools closest in geography to Brick, two have been closed in recent years (Gra-Mar Middle and Joelton Middle). The remaining three middle schools have all been on the priority list continuously since the 2017-18 school year. Zoned elementary schools in the area have also struggled. In the White's Creek Cluster (our primary cluster) both elementaries, Alex Green and Cumberland, were priority schools from 2017-2021 and the third elementary school, Lillard, was closed in 2020. Whites Creek High School, the zoned high school option for the Brick Church community, has been on the priority list continuously since 2017. See section 1.4 below for a more detailed comparison of Brick Church's academic results to those of peer schools.

Listed below are the enrollment trends over the past five years for schools within our primary and secondary enrollment zones. Both zones saw significant decreases as a result of the pandemic, but have largely stabilized since 2020. In both clusters, there has been a shift in enrollment from middle to elementary as a result of the MNPS ReImaginED decision to move 5th grade into elementaries, beginning in 2021. Despite this shift, combined elementary and middle grade enrollment has remained consistent since 2020 in both clusters.

Elementary & Middle Enrollment by Cluster





School (Whites Creek Cluster)	Feeder	2018	2019	2020	2021 <sup>3</sup>	2022	2023	Enrollment Change Since 2018	Enrollment Change Since 2020
Joelton Elementary	Secondary Feeder	257	260	194	238	256	269	5%	39%
Robert E. Lillard Elementary	n/a	264	223	closed					
Cumberland Elementary	Secondary Feeder	275	265	361	486	435	435	58%	20%
Alex Green Elementary	Primary Feeder	259	241	291	383	414	447	73%	54%
Elementary Total		1055	989	846	1107	1105	1151	9%	36%
Joelton Middle School	n/a	318	283	closed					
LEAD Brick Church		304	337	327	270	228	231	-24%	-29%
Haynes Design Center	Cluster Co-Middle School	244	215	459	326	283	246	1%	-46%
Middle Total		866	835	786	596	511	477	-45%	-39%
<b>Elementary &amp; Middle Combined</b>		<b>1921</b>	<b>1824</b>	<b>1632</b>	<b>1703</b>	<b>1616</b>	<b>1628</b>	<b>-15%</b>	<b>0%</b>
Whites Creek High	Cluster High School	658	503	499	513	579	616	-6%	23%
Whites Creek Cluster Enrollment		2579	2327	2131	2216	2195	2244	-13%	5%
School (Maplewood Cluster)	Feeder	2018	2019	2020	2021	2022	2023	Enrollment Change Since 2018	Enrollment Change Since 2018
Shwab Elementary	Secondary Feeder	290	332	271	321	330	309	7%	14%
Tom Joy Elementary	Secondary Feeder	386	354	316	400	450	450	17%	42%
Ida B. Wells Elementary	Tertiary Feeder	300	257	227	274	217	204	-32%	-10%
Chadwell Elementary	Tertiary Feeder	338	331	276	348	399	408	21%	48%
Hattie Cotton Elementary	Tertiary Feeder	258	236	223	272	247	216	-16%	-3%
Elementary Total		1282	1178	1042	1294	1313	1278	0%	23%
Jere Baxter Middle	Cluster Co-Middle	257	274	513	410	428	364	42%	-29%

<sup>3</sup> 2021 represents a shift of enrollment from middle to elementary as elementary began operating 5th grade.

	School								
Gra-mar Middle School	n/a	326	347	closed					
Middle Total		583	621	513	410	428	364	-38%	-29%
<b>Elementary &amp; Middle Combined</b>		<b>1865</b>	<b>1799</b>	<b>1555</b>	<b>1704</b>	<b>1741</b>	<b>1642</b>	<b>-12%</b>	<b>6%</b>
Maplewood High School	Cluster High School	747	775	739	708	703	700	-6%	-5%
Maplewood Cluster Enrollment		2612	2574	2294	2412	2444	2342	-10%	2%

LEAD Brick Church serves a predominantly African American population. For 2023 our demographic breakdown is as follows: 77.5% are African American, 14.9% are Hispanic, 4.42% are white, and 3.2% are two or more races. 68.40% of students are economically disadvantaged, 17.3% are limited English proficient, and 16.1% are students with disabilities. The student population of the broader Whites Creek community is almost identical to that of LEAD Brick Church with very similar student and family demographics. Our secondary feeder zone has a slightly higher proportion of Hispanic students, most of whom attend Shwab Elementary. The current student demographics closely mirror the demographics from Brick Church several years ago, with a slow increase of Spanish-speaking students. We anticipate the majority of any growth in student enrollment to come from the Jere Baxter Middle geographic area. As a result, we anticipate gradual increases in our Hispanic population which we have already accounted for by having Spanish speakers on our Family and Community Engagement Team. This growth is reminiscent of trends we have experienced before.



We have learned from experience at LEAD Neely's Bend to anticipate that some families from our default feeder elementary will no longer choose us as an option once the zoned enrollment pattern expires. While we have already begun the work of expanding our enrollment zone, we do not anticipate that this expansion will fully make up for the loss of enrollment anticipated by our current direct elementary feeder. As a result, the enrollment summary below shows an enrollment of 240 in the first year under Charter Commission's authorization and then ramps up by 25 additional students to 265. This slower growth model will provide additional time for us to fully execute our broadened enrollment strategy and to build greater relationships within the broader Whites Creek geographic zone. However, Brick Church is somewhat buffered by this concern as almost half of its enrollment is currently coming from non-zoned elementaries. This means that Brick already has established feeders from outside its zoned school, and it also limits the number of families who are directly impacted by this shift.

If authorized by the Charter Commission, LEAD Public Schools will operate its own lottery process which will include a re-registration period for our currently enrolled LEAD Brick Church students. The re-registration process will kick off prior to the lottery so that we can have an adequate understanding of the intentions of our currently

enrolled students and can adequately estimate the number of students needed to be successfully recruited and accepted via our lottery process and application launch. The re-registration process will include a digital process, social media communication, and also a paper process so that we can continue as we have in past years in maintaining a greater than 95% response rate from families. This process will be done collaboratively by our campus family and community engagement coordinator, front office staff, campus leadership team, and our network recruitment team.

Our recruitment and family engagement team maintains a recruitment calendar that includes attending and hosting community events and canvassing throughout the community. We will continue these efforts to generate leads from families in the Whites Creek community and will expand our community canvassing to include the Maplewood enrollment zone to broaden our reach. We have identified key apartment complexes in each of these zones where we will continue to work collaboratively with apartment managers to host informational sessions and community events to cultivate interest in LEAD Brick Church as an open enrollment charter school. Additionally, we will work with our partners at community centers to promote our school as an option to families as we build the brand in the Whites Creek community.

Once the application launches, we will host a series of application events during which we will open our campus to families so that they can meet our faculty and staff, receive a tour of the campus, and be able to utilize our computers to apply to LEAD Brick Church. After the 30-day lottery period, we will then execute the lottery and accept families in the order in which they applied to LEAD Brick Church. As families accept or decline their seats, we will proceed through the waitlist until we hit our enrollment targets. Throughout this process, we will continue our community engagement efforts. Additionally, we will engage our feeder schools by hosting informational sessions both at LEAD Brick Church and also at the feeder elementary schools to provide information about LEAD Brick Church. As an open enrollment school, our recruitment strategy will include community canvassing, door-knocking, flyer distribution, business canvassing and engagement, partnerships with community organizations, referral campaigns, and deepening our relationships with current families through our family support initiatives (Serve Others Stations, the LEAD Exchange, etc.).

Our current enrollment philosophy for LEAD Brick Church includes backfilling our enrollment due to anticipated attrition as the year progresses. This will remain a part of our enrollment strategy if we join the Tennessee Public Charter School Commission.

See Attachment D and below in the Recruitment and Enrollment section for further details.

Below you will find our enrollment summary and anticipated demographics charts. We anticipate smaller fifth grade cohorts as MNPS has reconfigured their grades to allow students in the 5th grade to remain at elementary schools. However, we have found that we can continue to enroll 5th grade students with our practices above and especially amongst younger siblings of our existing students. Additionally, with the change to the Tennessee Public Charter School Commission, some attrition may occur in the upper grades as we shift from zoned enrollment to fully optional schools enrollment, which requires our recruitment team to increase the number of leads, applications, and referrals from currently enrolled students. With this shift, we have increased capacity on the Network Family Engagement Team to reflect an increased need for community engagement and recruitment.

## **Student Enrollment**

Grade Level	Current (November 2023)	Year 1 - 2024	Year 2 - 2025	Year 3 - 2026 (Fully Enrolled)	Year 4 - 2027	Year 5 - 2028	Year 6 - 2029	Year 7 - 2030	Year 8 - 2031	Year 9 - 2032	Year 10 - 2033
5	33	30	45	45	45	45	45	45	45	45	45
6	75	75	75	75	75	75	75	75	75	75	75
7	83	65	75	75	75	75	75	75	75	75	75
8	60	60	70	70	70	70	70	70	70	70	70
<b>Totals</b>	251	230	265	265	265	265	265	265	265	265	265

Current Demographics	% of Economically Disadvantaged Students	% of Students with Disabilities	% of English Learners
	68.40 %	16.1%	17.3%

Anticipated Demographics in Year 1 under Charter Commission	% of Economically Disadvantaged Students	% of Students with Disabilities	% of English Learners
	72%	18%	22%

### 1.3 Academic Focus and Plan

In this section:

- What is the school's academic focus and plan? How has your school demonstrated success with this plan?
- (If applicable) Describe any key academic plan features for the charter school that differ or will differ from the operator's original application. Provide the rationale for implementing these different features and any new resources they would require.
- Describe what has worked within the school's academic plan that the school intends to continue if authorized by the Charter Commission. What adjustments, if any, may need to be made?
- Describe the trajectory of the charter school's academic performance during the duration of its charter term under the ASD using the publicly available data, and any relevant internal assessment data. Discuss any challenges the school has faced in its charter term and how the school adjusted to overcome those challenges.

Key components of our success have been our mission, model, and people. LEAD school culture has always been anchored in our Ethos and placing a high value on social and emotional learning. We

continue to prioritize time in the day for CREW and create a joyful culture in which students build meaningful relationships with adults.

Literacy, along with the recognition that ELA drives success in all subject areas, remains a core tenet of our approach to instruction, as does high-quality state standards-aligned curriculum, data-driven instruction and our overall assessment philosophy. In 2021-2022, the LEAD network introduced new math and ELA curricula across all grades, ensuring teachers were supported and trained on these new core curricula. We have continued to provide robust support in math and ELA, while also supporting the adoption and implementation of common curricula across the network in science and social studies. The network has also added positions to support science and social studies content teachers. We are expanding data-driven instruction services that function within our curriculum to align assessment strategies culminating in predictive interim assessments.

From the beginning, LEAD Brick Church put forth significant resources and efforts into supporting diverse learners, including students with IEPs and English Language Learners. Over the past three years, enrollment for English Learners, including Transition Levels 1-4, has hovered around 20%. Our percentage of students with disabilities has ranged from approximately 14% up to 17%. In comparison, MNPS reported 12% students with disabilities (students with disabilities) and 27% English Learners with Transitional 1-4 in 2023.

Even when student achievement overall increased, we realized that we were struggling to consistently narrow achievement gaps among all students and our students with disabilities and English learners. In 2023, LEAD Brick Church entered a partnership with All Means All (AMA), a 15-month, cohort-based fellowship for school leaders and their school- or network-based teams. The program pairs key levers to address inequity in schools with deep coaching, feedback, and collaboration to sustain it. Through this work, we have been able to shine light on systemic barriers to achievement for our diverse learners and to begin the work to address the root causes of lack of strong student outcomes. Essential to this work is our focus on narrowing the differentials in achievement on both our network-wide and state assessments. After each interim assessment, these differentials are analyzed and strategies for addressing areas of need are formulated.

AMA has also informed our work around hiring, staff development, and staff ownership of the opportunities and challenges at LEAD Brick Church. We revisited our school's mission and developed a set of values, actions, and behaviors we believe to be essential for staff success in increasing student outcomes. We are unashamedly transparent about these beliefs within the hiring process and have found that this transparency has led to hiring of staff who are aligned with our belief in the inherent worth of all students and their capacity to grow and learn. Staff are grounded in LEAD Brick Church's values, actions, and behaviors upon their entry and intentional reorientation occurs frequently throughout the year. LEAD Brick Church staff engage in data-driven decision making, and AMA's radical problem solving process has allowed team members from diverse roles and backgrounds to work together to tackle problems from a variety of perspectives. This process creates buy-in for solutions to challenging situations and distributes ownership for the work to accomplish those solutions among school teams. Finally, our work with AMA has fostered a laser-like focus on narrowing gaps in student achievement and reducing differentials among student subgroups and the "all students" category on network- and state-wide assessments.

Central to all our work is ensuring that teachers have the skills and resources necessary to implement our instructional model with fidelity and to target instruction to drive the strongest outcomes for students. We have invested heavily in a coaching model that provides teachers with the support they need to develop best in class management structures, data-driven practices, and clear lesson planning practices that lead to the internalization of curriculum so that our time is spent on student actions and student success. Teachers and instructional coaches are supported across core content areas by the Network Academic Team.

We have added administrative support in the form of assistant principals and instructional managers dedicated to specific subject areas and cultural excellence. This ensures that every teacher has a dedicated school leadership team member to provide coaching and development. The Academic Team has developed and is implementing an assistant principal of instruction (API) cohort focusing on both best practices in the art of instructional coaching, content-specific coaching practices, and data-driven instruction. Academic Team members also meet regularly with instructional managers at their schools and conduct bi-weekly “huddles” to facilitate collaboration among similar roles across the network.

Finally, the focus on data-driven instruction and decision making has been embraced by network and school teams and has been enhanced through the refinement of our assessment strategy and the development of our Student Needs Assessment Protocol (SNAP). Academic and culture data are reviewed in accord with continuous improvement cycles in which data is used to plan, plans are implemented, data are gathered and reviewed, and refinements to plans made based upon that data. Examples of this include the following:

- Exit tickets and student work are analyzed at least 2-3 times per week to determine areas for review as soon as the next day of instruction.
- Quiz, mid-unit assessment, and unit assessment data is used to identify strengths and areas for targeted instruction via spiraled Do Nows, embedding review into upcoming lessons, or full reteach lessons.
- SNAP meetings are conducted every mid-quarter to ensure students in need of academic, behavioral or attendance interventions receive timely support and to assess improvement in identified areas of need.
- Interim assessments, given three times per year, are analyzed within days after administration and data are used to develop reteach plans.
- MAP assessments are administered three times a year, and progress towards Individual Growth Goals is evaluated and discussed with students resulting in plans to develop critical skills, including strategic placement in reading and math interventions, developed.
- Progress monitoring data informs success and areas of need for students enrolled in Tier 2 and Tier 3 interventions.
- TCAP assessments are reviewed at the end of each school year to inform instructional planning for the upcoming school year.

To illustrate our data driven approach, see below for an example of the Student Data Dashboard for a current 7th grader at LEAD Brick Church.





# LEAD Public Schools

## Student Data Dashboard

### Student Demographics

grade_level	ell_status	exed_status	Reading Int	Math Int
7	LEP	Not ExEd	SRA Level C	

Select School: LEAD Brick Church (1) ▾

Select Student: [REDACTED] \*

### Screening

This section includes data from various student screening tools. CMBR is a reading screener that students take three times a year. Student Risk scores are listed for a student based on their attendance, behavior, grades, and overall risk scores, as defined by the student risk tracker. Student tiers are also provided below, based on overall risk scores.

#### CBMR Screener

Fall 23 WRC	Fall GL Norm	Winter 23 WRC	Winter GL Norm	Spring 24 WRC	Spring GL Norm
138	176	No data	185	No data	198

MQ1 Overall: 0	MQ2 Overall: 0
MQ1 Behavior: 1	MQ2 Behavior: 3
MQ1 Grades: 4	MQ2 Grades: 3
MQ1 Overall: 5	MQ2 Overall: 6

#### Student Need (SNAP)

MQ1 Tier	MQ2 Tier
Transitional	Transitional

MQ1 Action Pla...	MQ2 Action Plan	MQ3 Action Plan	MQ4 Action Plan

#### Do The Math Screener

# Core - Unit 1 Score	Add/Sub - Unit 2 Score	Multi - Unit 3 Score	Div - Unit 4 Score	Frac - Unit 5 Score	Overall Score
3	8	4	2	3	20

### Assessments

Various assessment data points are included below. Interim assessments are shown for this year, alongside TNReady performance bands from last year. Next, FLAs are shown above a student's previous year ACCESS scores, as well as their current ACCESS goals. ACT data includes all tests from both Practice ACT and the statewide ACT. Finally, NWEA MAP data is shown for the previous two years, including various metrics for achievement and growth over time.

#### Interim Assessments

assessment_title	Performance Band	percent_correct	subject	administration_date
No data				

[Click Here for MAP Performance Bands](#)    [Click Here for TN Performance Bands](#)

#### Previous TNReady Scores

ContentArea Code	ProficiencyClassification	school_year
SOC	Approaching Expectations	22-23
SCI	Below Expectations	22-23
MAT	Below Expectations	22-23
ENG	Below Expectations	22-23

#### FLA + ACCESS

R1 Listening FLA	R2 Listening FLA	R3 Listening FLA	R1 Reading FLA	R2 Reading FLA	R3 Reading FLA	R1 Writing FLA	R2 Writing FLA	R3 Writing FLA	R1 Speaking FLA	R2 Speaking FLA	R3 Speaking FLA
4.7	3.2		4.3	3.7		1.2	2.7		3		

22-23 Assessment Type	22-23 Listening	Listening Goal	22-23 Reading	Reading Goal	22-23 Writing	Writing Goal	22-23 Speaking	Speaking Goal
ACCESS for ELLs 2.0	3.8	4.3	2.8	3.5	3.7	4.2	2.5	3.2

[Click Here for FLA Dashboard](#)

#### ACT

Composite	English	Math	Reading	Science	AssessmentType	Term
1-1/1 < >						

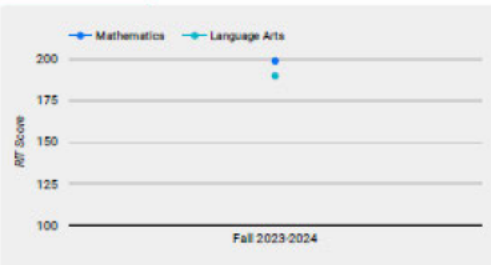
[Click Here for ACT Dashboard](#)



#### MAP Achievement

TermName	Subject	Perce ntile	RIT Score	Project F-S Growth	1.5yr Growth Goal	Lexile
Fall 2023-2024	Mathematics	11	199	7	210	
Fall 2023-2024	Language Arts	7	190	7	201	495L

[Click Here for NWEA Dashboard](#)



#### Previous Year MAP Growth

Reading	Mathematics
F-S Proj Pts Growth: No data	F-S Proj Pts Growth: No data
F-S Actual Pts Growth: No data	F-S Actual Pts Growth: No data
F-S Year Growth Equiv: No data	F-S Year Growth Equiv: No data

[Click Here for NWEA Reports](#)



See Section 1.4 below for a detailed analysis of our success with our plan. More about the LEAD Assessment Strategy can be found in Section 1.6.

Our original charter application to the Achievement School District was finalized in 2011, prior to the selection of LEAD Brick Church as a partner school. While we maintain many components of our original model, we have adopted new practices over the past 12 years in an effort to tailor our model to the specific needs of the students at LEAD Brick Church and to continuously improve our academic program. Below we have outlined some of the core practices that have evolved over time or have been enhanced:

1. **Grades Served.** The original charter application was awarded for a 5-12 school. In 2016 the Tennessee Attorney General issued a ruling that the ASD could no longer serve grades that were not previously served prior to the ASD and therefore LEAD Brick Church was not allowed to enroll high school students. Much of our original application speaks to our high school academic model, including direct college supports, which are not relevant to our middle school grades.
2. **Updated staffing model.** Over time, additional TISA funding has allowed us to expand our staffing model, most notably by the inclusion and development of multiple instructional managers and other instructional leaders. At LEAD schools across our network, we have built a model wherein there is one instructional leader for every six to eight teachers. This allows our coaches to prioritize the development of our teachers through regular, on-going feedback. See the Personnel section below for further details.
3. **Updated approach to the school year and school calendar.** We found that Saturday school was not an effective tool for accelerating learning, as many of our families were unable to participate and it led to instructor burnout. Instead, we have focused on providing a high-quality summer school for our students. Many of our families have students in multiple MNPS schools and feedback from families and attendance data showed that many families preferred to have all their children in a similar school calendar. We have chosen to closely follow the school calendar set by MNPS and instead focus on the quality of time in the school day rather than the quantity of time. Similarly, we moved to a consistent school day Monday through Friday rather than an early release on Wednesday, which was difficult for working parents. Instead of providing a half day PD for staff on Wednesdays, we maintain an increased number of staff days in our calendar for staff professional development, especially during the summer, and require one day weekly of after school PD. See the School Calendar section below for further details.
4. **Enhanced curriculum.** Over the years, our academic model has been tailored to meet the needs of LEAD Brick Church students and changing Tennessee academic standards. We no longer are associated with the Expeditionary Learning program and instead have chosen to implement instruction using the following curricula, ensuring careful alignment with Tennessee State Standards:
  - Achievement First (AF) Math: The Achievement First (AF) middle school math curriculum has been designed to provide students with standards-aligned, rigorous grade-level work every day. The design of the lessons asks students to grapple with a problem by making connections to previously learned content, and then leverage their own thinking and the thinking of their peers to gain new insights and content understandings. The lessons aim to meet the definition of rigor in math: a balance of fluency, conceptual understanding, and coherence.
  - Reading Reconsidered - Reading Reconsidered is a novel centric curriculum focused on knowledge building and writing. Students engage with text in three different ways:

Accountable Independent Reading (silent, autonomous reading), FASE Reading (shared read-aloud between students and teachers), and Read Aloud (teachers reading texts out loud).

- Gallopade - Gallopade is a curriculum focused on Tennessee Academic Standards for social studies and is designed to engage students in a multi-sensory learning experience. Gallopade blends interactive print and digital tools with literacy enhancement builders.
- STEMScopes - The STEMScopes Tennessee curriculum is structured not only to help children learn science concepts, but also to develop an ability to think scientifically. This core curriculum integrates active investigation and multisensory learning, an approach proven effective for all learners regardless of prior knowledge, language, or background. Additionally, the STEMScopes follows the 5E model for teaching science which has students start with hands-on learning through inquiry. Teachers and instructional managers work together to ensure that supplements are woven into the curriculum to meet all Tennessee Science Standards.
- Common Intervention Curriculum - Common curricula are utilized for both reading and math intervention for students with IEPs, as well as for Tiers II and III of Response to Instruction and Intervention. For reading intervention, exceptional education teachers utilize Brainspring Phonics First & Structures curricula, Orton-Gillingham Multisensory Structured Literacy programs. Both programs are accredited by the International Dyslexia Association (IDA). RTI Reading Interventions utilize SRA Corrective Reading Decoding Strands A, B1, B2, C. *SRA Corrective Reading* provides intensive direct instruction-based reading intervention for students in Grades 3–Adult who are reading below grade level. This direct instruction reading intervention program delivers tightly sequenced, carefully planned lessons that give struggling students the structure and practice necessary to become skilled, fluent readers and better learners. The program is research-based and highly scripted.

For math intervention, RTI math interventionists utilize the Do the Math curriculum. This heavily scripted, direct instruction curriculum is grounded in manipulatives and focused on building students' numerical reasoning skills through multiple representations. Do The Math builds and rebuilds critical foundations by focusing on understanding and skills with both whole numbers and fractions. Students make progress through carefully scaffolded instruction from the basics to more complex operational work. Students learn, process, and build a deep understanding of crucial arithmetic concepts. Math intervention is provided daily in small doses to groups of 3-8 students. Students are placed in intervention groups focused on addition and subtraction, multiplication, division, or fractions based on need determined through a combination of universal screening and math placement tools.

5. **Enhancements to our Academic Model:** At the network level, additional support has been added to enhance student learning across the continuum.
- MTSS Model: To support our multi-tiered systems of support (MTSS) model, we hired a director of MTSS to lead the work around expanded intervention in reading and mathematics, as well as a director of student supports to lead the work around behavioral supports. At the school level, instructional managers, assistant principals of instruction, assistant principals of students, and deans of culture monitor these efforts to ensure students' academic and emotional needs are met.

- Diverse Learners: As our student demographics have changed with an increase in both students with disabilities and English learners, additional supports have been added at the school and network levels.

Our English Learners are given opportunities to demonstrate proficiency in their home language and pursue the pathway to the Seal of Biliteracy through Avant assessments discussed in our assessment strategy. Students' progress towards achieving their ACCESS growth goals is monitored using internally developed formative language assessments. Strong instructional practices are evaluated using internally developed EL Arcs of the Year, a document focused on best practices in EL instruction and teachers' improvement in their use throughout five distinct segments of the year.

A more robust universal screening process allows us to more effectively identify students in need of additional support and to quickly begin the progress monitoring process. At the network level, our director of exceptional education instruction works closely with instructional managers to provide professional learning focused on differentiated instruction and behavior support. In collaboration with network core content area directors, training focused on serving diverse learners across all content areas is routinely delivered. Our director of exceptional education compliance focuses on ensuring that school teams are well trained in development of IEPs tailored to meet the needs of students with disabilities while supporting instructional managers meeting compliance requirements at the school level.

- Foundational Reading Training: In accordance with state law, all 5th grade teachers are trained in the principles of foundational reading. Professional learning has been developed in partnership with TNTP and based on the TN Foundational Reading Standards. In the 2021-2022 school year, LPS took this training a step further by requiring it not only for all 5th grade teachers but also all EL, ExEd, and ELA teachers, regardless of grade level served.

See Section 1.4 for a detailed analysis of the school's academic performance and related adjustments.

#### 1.4 Academic Performance Standards

*In this section:*

- (a) *Describe how the school met the academic performance standards of the ASD such that it is qualified to exit the ASD. How does the school plan to continue this upward trajectory to remain open under the Charter Commission?*
  - a. *If the school has achieved priority exit status, provide documentation of this status and a description of how the school achieved priority exit status.*
  - b. *If the school did not achieve priority exit status, provide context, academic data, and documentation to justify approval by the Commission for continued authorization.*
  - c. *Based on the school's past academic performance, describe why you determined that the school's academic achievement and growth are a success and deserve continued authorization by the Charter Commission based on the Commission's scoring rubric.*

- (b) *Discuss the school's academic performance in comparison to the existing schools in the community and how the school is offering a better option for students.*
- (c) *Describe the school's annual and long-term academic achievement goals to meet the academic performance standards contained within the Charter Commission's [performance framework](#).*
- i) *Reflect on the school's three-year discipline and chronic absenteeism rates and how the school plans to further reduce these rates to meet standards as outlined within the Commission's School Performance Framework.*
  - ii) *Reflect on the school's three-year proficiency rates for all subgroups and describe how the school plans to continue to improve the academic performance for all students to meet standards as outlined within the Commission's School Performance Framework.*
  - iii) *Given the previous interruption in state testing data, please provide and analyze primary internal assessment data, including for years without state testing data to supplement and demonstrate academic achievement and growth. Please provide the nationally normed or state-aligned assessment being used and the frequency with which it was given.*
  - iv) *Provide, as Attachment M, the most recent performance/evaluation/renewal reports produced by the authorizer(s) (or by a third-party evaluator, if applicable) of all of the network's charter schools, including the ASD SPF profiles if the network has other schools under the ASD.*
- (d) *Describe the process for setting, monitoring, and revising academic achievement goals.*

In 2012, LEAD partnered with Brick Church—a school with a long history of underperformance—with the goal of improving academic outcomes and exiting priority school status. In November 2023, LEAD Brick Church met the criteria for exiting the state priority list, making it eligible to exit the ASD and apply directly to the Tennessee Public Charter School Commission (See Attachment U for confirmation from the ASD for exiting the Priority List). While we celebrate this historic accomplishment for our students, we recognize LEAD Brick Church has not yet achieved the level of success we firmly believe possible for our students and that additional work and time is needed to build on our students' accomplishments. To that end, LEAD Brick Church has firmly established a strong instructional model, data-driven teaching practices, and a culture of support for both students and staff that are evidencing worthwhile growth. LEAD has a clear plan in place to ensure that this growth continues and accelerates so that all Brick Church students can achieve at high levels.

### **Historical Performance**

The Achievement School District began oversight of schools in 2012. Among the first six schools in the district, only one from Nashville was selected, LEAD Brick Church. At the time, Brick was the lowest performing middle school, in terms of proficiency, in the city of Nashville. LEAD was in



the second year of its partnership with MNPS to turnaround Cameron, the first conversion school in the state of Tennessee. Based on its strong results with LEAD Academy, and early promising results with the conversion of Cameron, Brick was awarded to LEAD Public Schools.

During the first three years of operation, LEAD converted each grade one year at a time. Initially, LEAD focused on building a strong student and family culture, while also driving improved academic results. During this time, chronic absenteeism hit an all time low of 12%, and success rate (measured by the former TCAP assessment) improved from 17.4% proficient under district management to 22.9% proficient by the time LEAD was supporting grades 5-8. During the early years, students with disabilities represented over 30% of students in the building, requiring a significant investment in staffing and focus. LEAD quickly adapted its staffing model and approach to students with special needs to support the significant needs in the building.

In 2016, with the adoption of common-core aligned assessment, TNReady, statewide proficiency rates significantly declined; Brick Church was no exception, seeing proficiency rates decline by about 20 percentage points. By the 2018-19 school year, Brick Church had adjusted to the new testing environment and was seeing significant student growth, with TVAAS levels of 4 and 5 in the 2018 and 2019 school years. During the 2018 and 2019 school years, LEAD Brick Church was on the path to meeting requirements to exit the priority list.

The 2020 pandemic significantly altered this journey with the transition to online learning. According to CREDO's [Meta-analysis of Academic Recovery after COVID-19](#), published in 2022, the pandemic caused widespread losses. Using learning loss estimates to determine lost days of learning based on the traditional 180 days of school, researchers found average estimates of how much students lost in the spring of 2020 ranged from 57 to 183 days of learning in reading and 136 to 232 days of learning in math. These losses were most evident among historically underserved students who were already behind academically prior to the pandemic. LEAD Brick Church was not immune, as evidenced by both falling achievement and a growth score of Level 1 in 2021.

Like those in other urban schools serving similar student populations, we know the recovery from the learning loss incurred during the pandemic will be a marathon, not a sprint. Still, once we returned to fully in person learning, we began to see the upward trajectory begin again. The most recent Achievement School District School Performance Framework provided for the 2021-2022 school year indicates that LEAD Brick Church rated as Approaching for the metric Mission: Reward School Success Rate Percentile Rank and as Exceeding in each of the other three metrics under the Academic Composite, gaining the overall ranking of Meeting under the Academic Composite for the 2021-2022 school year. In addition, we saw the success rate increase by 2.3 percentage points and then again by 3.3 percentage points in the 2022 and 2023 school years. TVAAS rebounded from a Level 1 in 2021 to a Level 5 for the 2022 school year and then a Level 3 for the 2023 school year.

### **Comparison to the Achievement School District**

While we understand that Brick Church must increase in proficiency and growth, students at Brick outperform their peers in similar schools. In comparison to other middle schools within the Achievement School district, Brick students have performed at the top of the pack in math achievement, scoring the second highest proficiency rates in 2022 and 2019, amongst the district. In ELA, Brick was the highest achieving ASD school in ELA in 2019, but

scored in the middle of the group post-pandemic in 2022. See below for a chart comparing Brick proficiency rates with other ASD middle schools. Note that 2023 data for other schools was not publicly available at the time of submission.

#### 6-8 ELA: TN Ready % Students who meet or exceed standards

	2018	2019	2021	2022
Brick Church: A LEAD Public School	7.3	9.8	<5	5.7
Humes Preparatory Academy Middle School	<5			<5
Journey Coleman School			<5	7.9
Journey Hanley Middle School			<5	6.6
KIPP Memphis Preparatory Middle	7.1	7.2		
Kirby Middle School	9.9	8.3	<5	7.3
Lester Prep	7.9	6.7	<5	7.4
Memphis Scholars Raleigh-Egypt	<5	<5	<5	<5
Westside Middle School		<5	<5	5
Wooddale Middle School	7.2	7.7	<5	11.3

#### 6-8 Math: TN Ready % Students who meet or exceed standards

	2018	2019	2021	2022
Brick Church: A LEAD Public School	9.3	13.4	<5	6.1
Humes Preparatory Academy Middle School	<5			<5
Journey Coleman School			<5	<5
Journey Hanley Middle School			<5	<5
KIPP Memphis Preparatory Middle	<5	8.4		
Kirby Middle School	11	7.3	<5	<5
Lester Prep	11.3	16.7	<5	5.2
Memphis Scholars Raleigh-Egypt	<5	<5	<5	<5
Westside Middle School		<5	<5	<5
Wooddale Middle School	6.6	8.4	<5	8

#### Comparison to Geographic Peers

In addition, LEAD Brick Church outperforms all other public middle schools in its geographic region in both achievement and growth, providing the best option for many families in the local area. Over the past few years, the middle school options in north Nashville have decreased, as Metro Nashville Public Schools chose to close both Gra-mar Middle School and Joelton Middle School. Both of the remaining middle schools, Haynes and Jere Baxter, have been designated as Priority Schools since 2017.

LEAD Brick Church demonstrated higher TVAAS growth than all area middle schools in 2018, 2019, and 2022. In 2018, LEAD Brick Church achieved Level 4, while each of the other four neighboring middle schools achieved Level 1. In 2019, LEAD Brick Church was again in the lead with Level 5 TVAAS, while two neighboring schools again achieved Level 1, one achieved Level 2, and one Level 3. By 2021, two out of five middle schools in the geographical area had closed. During that school year, LEAD Brick Church, along with the two other remaining middle schools in the geographical area achieved Level 1 TVAAS. While LEAD Brick Church experienced a significant dip in both growth and achievement during the pandemic,

rebound was evident in the 2022 school year with both Level 5 TVAAS and increased achievement in both ELA and math.

ELA TNReady Results Grades 6-8				
Area Schools	2018	2019	2021	2022
LEAD Brick Church	7.3	9.8	*	5.7
Gra-mar Middle	8	7.1	Closed	Closed
Haynes Middle	6.4	*	*	*
Jere Baxter Middle	6.2	*	*	5.8
Joelton Middle	5	*	Closed	Closed

Math TNReady Results Grades 6-8				
Area Schools	2018	2019	2021	2022
LEAD Brick Church	9.3	13.4	*	6.1
Gra-mar Middle	5.8	6.2	Closed	Closed
Haynes Middle	*	9.1	*	*
Jere Baxter Middle	*	5.5	*	*
Joelton Middle	*	5.3	Closed	Closed

TVAAS				
Area Schools	2018	2019	2021	2022
LEAD Brick Church	4	5	1	5
Gra-Mar Middle	1	2	Closed	Closed
Haynes Middle	1	3	1	3
Jere Baxter Middle	1	1	1	3
Joelton Middle	1	1	Closed	Closed

### **Data Analysis and Approach to Off-Track Statuses**

Despite performing at or above both our peer schools in the Achievement School District, as well as showing strong results in both proficiency and growth within our local school cluster, we recognize that there is more work to do to meet all the standards of the TPCSC Performance Framework. LEAD Brick Church is taking a multipronged approach to meeting the academic performance standards contained in the Charter Commission's framework. We believe that there is no single solution to improve student performance and that, in order to turn around a school, it takes a holistic approach to student learning. We are committed to providing an experience for our students that



improves their academic outcomes, provides them with the skills they need to be successful in high school and beyond, and provides them with a love and appreciation of learning that will lead them to further success.

## **ELA**

While LEAD Brick Church scores in the middle of ASD schools in terms of ELA proficiency, it does not yet exceed the overall proficiency of the ASD or MNPS and therefore, scores an “off track” for ELA. Brick Church has identified several strategies to dramatically improve ELA proficiency and score a Level 5 growth in ELA for all students.

### **Reading Intervention**

Data from the 2020-2021 school year highlighted the need for intensive reading intervention for a significant number of our students. At the network level, a director of MTSS was hired to support and evaluate reading intervention efforts across the network. The expanded intervention program was developed throughout the 2021-2022 school year and fully implemented during the 2022-2023 school year. Multiple reading interventionists have been hired across all network schools, including LEAD Brick Church. These interventionists are provided intensive initial training on their assigned curriculum and coaching to ensure fidelity of implementation throughout the year. The efficacy of this initiative is being monitored using a variety of nationally normed assessments as well as internally developed walkthrough tools.

Specifically, LEAD Brick Church expanded RTII programming to more than double the number of students in tiered reading intervention in Year 1 and adopted new scheduling to dedicate additional time to reading intervention using common curricula within each tier. At the end of the 2023 school year, students in Tier 2 and Tier 3 intervention at LEAD Brick Church were scoring promisingly at the 69th growth percentile as measured by Fastbridge’s CBMReading, and 34 out of 125 students, or 27% enrolled in either Tier 2 or Tier 3 intervention, were able to exit to Tier 1 intervention.

### **Curriculum and TNReady Results**

Also in 2021, school and network leaders recognized the need for more robust ELA curricular support. We sought the expertise of The New Teacher Project (TNTP) whose mission is to end the injustice of educational inequality by providing excellent teachers to the students who need them most and by advancing policies and practices that ensure effective teaching in every classroom. With their help, we researched and adopted Reading Reconsidered, a novel centric curriculum focused on knowledge building and writing. Reading Reconsidered allows students to engage with text in three different ways: Accountable Independent Reading (silent, autonomous reading), FASE Reading (shared read-aloud between students and teachers), and Read Aloud (teachers reading texts out loud). We continued our partnership with TNTP as we moved into curriculum implementation in 2022, and we also sought the expertise of Reading Reconsidered curriculum developers.

We believe the investment in reading intervention will ultimately positively impact ELA achievement; still, we know that success from Tier 2 and Tier 3 interventions takes time to develop. Strong Tier 1 instruction is crucial to student success. Analysis of ELA scores at LEAD Brick Church revealed minimal overall proficiency gains from 2021-2023. We saw strong increases in achievement in grades five and six, but some regression in grades seven and eight. We also noted increases in achievement from cohort to cohort from 2021 to 2022. From 2022 to 2023, there were decreases in cohort achievement, with the exception of the fifth grade class of 2022 that experienced an increase of almost seven percent in 2023 (in sixth grade), and the seventh grade class of 2021 that remained essentially unchanged upon completion of eighth grade in 2022.



LEAD Brick Church			
Percent On Track/Mastered			
Subject	2021	2022	2023
5th ELA	0.00%	3.33%	11.10%
6th ELA	5.25%	5.88%	10.30%
7th ELA	4.94%	7.79%	3.90%
8th ELA	4.40%	4.71%	2.80%

These results are aligned with national trends. In a July, 2023 report based on NWEA MAP data<sup>4</sup>, the Center for School and Student Progress found that in the 2022-2023 school year, nearly all grades demonstrated achievement gains that fell short of pre-pandemic trends, stalling progress towards pandemic recovery. Significant achievement gaps persisted at the end of the 2022-2023 school year, with the average student needing 4.1 months to catch up in reading and 4.5 months to catch up in math. While all students lagged in achievement, traditionally underserved students remained farthest from full recovery.

Post-pandemic, more than ever, strong Tier 1 instruction is the key to increasing student outcomes; thus, our network literacy director is supporting instructional managers in their development of teachers through strengthening the process of IPP (Intellectual Preparation Protocol) and data analysis.

Based on review of 2023 TNReady data, she is also leading additional efforts to increase student outcomes in ELA including curriculum modification, refinement of ELA priorities, and enhancing teacher quality and development. For curriculum modifications, we are adjusting questions in lesson plans to mirror the language used in standards and state assessment and adding more multiple choice practice. We are also using Patterns of Power, a supplementary grammar curriculum, and network mid-unit essays including explicit writing instruction for all three types of essays (narrative, informational, and argumentative). We are in our third year of using the Reading Reconsidered curriculum and spent our summer professional development moving teachers from using the curriculum with fidelity to using the curriculum effectively. This includes incorporating student autonomy, cultivating a culture of error so students feel safe to get the answer wrong and revise their response, and training teachers to plan rigorous exemplars and holding students to reaching those through back pocket questions. Lastly, we are improving our hiring process to ensure teachers are certified in literacy instruction and retaining effective teachers so we can continue to develop them in the curriculum year after year.

### **ELA Interim Assessments and MAP Reading**

LEAD has a long history of using data to guide instructional decision making. To strengthen our practice, this year LEAD has partnered with MasteryConnect to implement MasteryView Predictive Assessments (MVPAs) that provide us with benchmarks tightly aligned to Tennessee state standards allowing us to gauge students' progress towards proficiency on TNReady assessments. These interim assessments (IAs) are developed by MasteryConnect based upon LEAD's scope and sequence for each tested content area. Data from LEAD Brick Church's first ELA IA

<sup>4</sup><https://www.nwea.org/news-center/press-releases/new-nwea-study-shows-progress-toward-academic-recovery-stalled-in-2022-23/>

provided us with valuable information regarding areas of need for current students, with two grade levels showing encouraging growth and two showing projections below the previous year's TNReady scores. These results are preliminary and based on the limited number of standards. We believe the work outlined above will ultimately result in better outcomes for students across all grades that will be revealed as the number of standards assessed on each MVPA increases throughout the year.

LEAD Brick Church		
Subject	Prof/Adv TCAP 2023	Prof/Adv IA#1 2023-2024
5th ELA	11.10%	0.00%
6th ELA	10.30%	8.60%
7th ELA	3.90%	8.80%
8th ELA	2.80%	6.10%

MAP reading data are used to inform educators about student needs in regards to foundational grade level skills. These also show mixed results, with a 4% increase of students scoring between the first and fortieth percentiles from Spring 2022 to Spring 2023. The most recent fall administration, however, shows a rebound and decrease of students in our lowest quintiles of almost 5%.

## **MATH**

LEAD Brick Church currently scores among the top of ASD middle schools in terms of math proficiency. Based on preliminary 22-23 results, we are optimistic that Brick Church will exceed the ASD proficiency rate for 22-23 and be "on track" on the TPCSC framework. However, Brick Church still lags MNPS in math proficiency. Brick Church has identified several strategies to dramatically improve math proficiency and return to a Level 5 growth for all students.

### **Intervention**

In the 2022-2023 school year, under the direction of the network director of MTSS, math intervention was expanded much in the same way as reading intervention. Through a partnership with Blueprint Learning, math interventionists are utilizing Do the Math, a structured curriculum, to provide students opportunities to gain identified foundational math skills. Specifically at LEAD Brick Church, 22% of students are receiving Tier 2 and Tier 3 intervention services. Services are provided for 25 minutes each day within the student's scheduled math block. Students who do not participate in Do the Math interventions have intervention in the math classroom with the math teacher, a math interventionist, and/or an ExEd teacher. In the Tier 1 math intervention, students complete targeted grade-level skills practice in IXL and receive small group instruction on just-in-time grade level skills or critical foundational skills.

### **Curriculum**

Data analysis in the 2019-2020 school year revealed the need for enhanced mathematics instruction and led to the adoption of Achievement First (AF) Math. We entered a partnership with AF Math to support curriculum implementation in the 2020-2021 school year and leveraged network experts to enhance teachers' skills in developing students' intellectual processing of math concepts. Support from AF Math continued through the 2022-2023 school year during which time we hired a network mathematics coordinator to target middle school math, enabling the director of mathematics to provide more assistance to high school math programs.

Students at LEAD Brick Church, and across the network, have seen increases in math proficiency over the past three years.

LEAD Brick Church		
Percent of Students Proficient or Above in Math		
2021	2022	2023
2.1%	5.4%	7.1%

Also encouraging is the trajectory of LEAD Brick Church's current 8th grade cohort, whose scores have consistently improved over a three-year period. We know that student mobility is a factor, yet, if we follow the data starting with students who were fifth graders in 2021, growth from 0% proficiency in 2021 to 7.8% proficiency in 2023 is evident. We see a similar trend with students who began as sixth graders in 2021 growing from a proficiency rate of 2.63% in 2021 to 10.6% in 2023, and from seventh graders who demonstrated proficiency in math at 1.16% in 2021 and had achieved a proficiency rate of 9.3% by their eighth grade year in 2022. This demonstrates that we consistently see year over year improvements in math for our student cohorts.

LEAD Brick Church			
Percent On Track/Mastered			
Subject	2021	2022	2023
5th Math	0.00%	0.00%	0.00%
6th Math	2.63%	1.96%	4.50%
7th Math	1.16%	5.13%	7.80%
8th Math	3.45%	9.30%	10.60%

### Math Interim Assessments and MAP Map

Data from our first math interim assessment have proven promising, as well, with three out of four grades predicted to show improvement on TCAP assessments. Immediately after the first interim assessment, data were analyzed and reteach plans were developed. We will compare data from this first interim assessment to the second interim assessment that will be administered the week of December 11th to again determine bright spots and areas of need for students.

LEAD Brick Church		
Subject	On Track/Mastered TCAP 2023	On Track/Mastered IA #1 2023-2024
5th Math	0.00%	9.70%
6th Math	4.50%	11.30%
7th Math	7.80%	17.60%

8th Math	10.60%	4.20%
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MAP math data are used to inform educators about student needs in regards to foundational grade level skills. This data also supports student growth in mathematics, with a 5.03% reduction of students scoring between the 1st and 40th percentiles from Spring 2022 to Spring 2023. The most recent fall administration shows a further decrease of an additional 3.5%.

## **SCIENCE**

### **Curriculum and TNReady Results**

LEAD has to streamline systems through the adoption of common curricula in science and social studies in the 2023 school year. Implementation of StemScopes Science (described in section 1.4) began this year and is supported by the network's director of science as well as school-based science instructional managers. Network-led professional development regarding the curriculum and best practices for lesson planning and delivery was offered at the beginning of the school year and is scheduled throughout the year. Instructional managers from across the network meet bi-weekly to focus on common trends, and the director of science meets with individual instructional managers bi-weekly to continue the focus on planning.

Much like we see in mathematics, year to year increases in achievement on TNReady assessments are evident in science with the exception of the cohort of students who entered LEAD Brick Church as 7th graders in 2021 to their 8th grade year in 2022. Most notable is the increase of 11.85% for students in the 6th grade cohort 2021 to the eighth grade cohort in 2023.

LEAD Brick Church			
Percent On Track/Mastered			
Subject	2021	2022	2023
5th Sci	2.00%	0.00%	0.00%
6th Sci	3.95%	1.92%	7.40%
7th Sci	7.14%	8.97%	11.50%
8th Sci	5.06%	2.35%	15.80%

### **Science Interim Assessments**

Data from our first interim assessment have shown mixed results with two out of four grades predicted to show improvement on TCAP assessments. Immediately after this first interim assessment, data were analyzed and reteach plans were developed. We will compare data from this first interim assessment to the second interim assessment that will be administered the week of December 11th to again determine bright spots and areas of need for students.

LEAD Brick Church		
Subject	Prof/Adv TCAP 2023	Prof/Adv IA#1 2023-2024

<b>5th Sci</b>	<b>0.00%</b>	<b>0.00%</b>
<b>6th Sci</b>	<b>7.40%</b>	<b>12.10%</b>
<b>7th Sci</b>	<b>11.50%</b>	<b>6.80%</b>
<b>8th Sci</b>	<b>15.80%</b>	<b>19.60%</b>

## **SOCIAL STUDIES**

### **Curriculum and TNReady Results**

While Gallopade (described in section 1.4) had been used for several years as a resource across the network, it was formally and fully implemented this year as our common curriculum and is supported by the network's director of social studies as well as school-based social studies instructional managers. Network-led professional development regarding the curriculum and best practices for lesson planning and delivery was offered at the beginning of the school year and is scheduled throughout. Instructional managers from across the network meet bi-weekly to focus on common trends, and the director of social studies meets with individual instructional managers bi-weekly to continue the focus on planning.

Year over year performance on TNReady social studies assessments is mixed, with scores showing significant gains from 2021-2022 for students enrolled at Brick from grades 6 through 7, but a significant decrease in scores as students moved from grade 7 in 2022 to grade 8 in 2023. We see increases, however, in students enrolled at LEAD Brick Church for 6th grade in 2022 to their 7th grade in 2023. We saw an increase of just over 2% from the 7th grade cohort in 2021 to their 8th grade year in 2022.

LEAD Brick Church			
Percent On Track/Mastered			
Subject	2021	2022	2023
6th Soc	7.35%	0.00%	12.00%
7th Soc	13.25%	19.23%	6.00%
8th Soc	5.13%	15.48%	9.30%

### **Interim Assessments**

Interim assessments show similar results, with projections of increased achievement in grades six and seven. As noted in the section on ELA above, these results are preliminary and based on a limited number of standards. We believe the intense focus on planning, supported by the network director of social studies and school-based instructional managers will ultimately yield more positive results. Data from the first interim assessment were reviewed at both the standard level and the item level, and reteach plans developed.

LEAD Brick Church		
Subject	Prof/Adv TCAP 2023	Prof/Adv IA#1 2023-2024
5th Soc	N/A	3.20%

6th Soc	12.00%	13.40%
7th Soc	6.00%	14.00%
8th Soc	9.30%	0.00%

## **SUBGROUP PERFORMANCE**

Economically disadvantaged (ED) students represent roughly 70% of our students, exceeding the rate of the ASD and doubling the rate of MNPS. We understand that due to student matching protocols, our ED rate is likely underreported and as a result, we operate as if close to 100% of our students are economically disadvantaged. Similarly, almost 100% of our students are Black, Hispanic, or Native American. Therefore, our strategies to improve proficiency to be “on track” for all students will also apply to both our ED students and to our Black, Hispanic, and Native American subgroups.

Though the increase in achievement in both ELA and math for our Hispanic students are bright spots for the 2022 school year, our subgroup proficiency scores indicate the continued need to increase achievement for all students, including our ExEd and EL subgroups. In comparison to MNPS, our proficiency rates for students with disabilities showed bright spots in 2017 and 2019 in math and ELA, respectively, but we have lost ground since the pandemic. We currently are off track on the TPCSC framework in this category and do not yet have insight into our 2023 comparative results. While our student counts are too low to report on or off track status for English language learner (ELL) students, improving ELL proficiency remains a goal.

In 2019, we saw a differential of just over 3% between all students and ELs; however, we saw a decrease of 6.67% for our ELs in 2021 resulting in scores below 5%. We have not yet recovered from the effects of the pandemic, with scores that remained below 5% in 2022. There is a slightly different trajectory for our students with disabilities, for whom we have shown continued issues in achievement in ELA. Scores have remained below 5% since the 2019 school year.

We see a similar story in math. Scores in 2019 showed a differential of .1% between all students and ELs; however, from 2019 to 2021, we saw a 10.7% decrease in proficiency and an increase in differentials. Again, recovery from the pandemic has been difficult, with math scores for ELs under 5% in both 2021 and 2022. We have shown continued issues with developing proficiency in math for our students with disabilities. Scores have remained below 5% since the 2019 school year.

<b>ELA</b>	<b>2018-19</b>	<b>2019-20</b>	<b>2020-21</b>	<b>2021-22</b>
All	9.8%	NA	<5%	5.4%
Ex Ed	<5%	NA	<5%	<5%
ELL	6.67%	NA	<5%	<5%
Hispanic	Combined with African American	NA	7.70%	9.70%

Math	2018-19	2019-20	2020-21	2021-22
All	13.4%	NA	<5%	5%
ExEd	<5%	NA	<5%	<5%
ELL	13.30%	NA	<5%	<5%
Hispanic	Combined with African American	NA	<5%	6.50%

Unfortunately, these statistics look similar across all ASD schools as well as those in our geographical area. From 2018-2022, less than 5% of students with disabilities in either of these comparison groups met or exceeded standards on TCAP tests in math for the grade band of 6-8, with the exception of LEAD Neely's Bend in 2018. For students with disabilities in the 6-8 grade band in ELA, LEAD Neely's Bend was the only school with reportable data in 2019, with Wooddale Middle in 2021 and Journey Coleman School in 2022 following suit. Both Wooddale Middle and Journey Coleman are authorized by the ASD. There were no schools in our geographic area scoring above 5% for students with disabilities in ELA from 2018-2022.

Though scores for English learners were better than those for students with disabilities pre-pandemic, in 2021, only two schools in the ASD earned reportable data for English learners in the grade 6-8 band in math, one of those being LEAD Brick Church. Schools in our geographic area were unable to report scores for this subgroup and gradeband. The math scores for LEAD Brick Church's English learners students fell below 5% in 2022. Still the only data above 5% for this subject, subgroup and gradeband among our comparison schools came from two schools within the ASD.

In ELA, English learners in the grade 6-8 band showed similar achievement trends with three schools in the ASD reporting data above 5%, Brick coming in third at 5.45%, and only one school within our geographic comparison schools showing reportable scores at 7.1%. The ELA scores for LEAD Brick Church fell below 5% for this subgroup and gradeband in 2022. The only comparison schools with reportable data for this subject, gradeband, and subgroup for 2022 were three schools located within the ASD.

To meet the TPCSC requirements and our own internal goals, we have developed a number of strategies to improve ELL and ExEd results. LEAD Brick Church has taken a multi-pronged approach to improving subgroup performance both prior to, during, and after the pandemic. The steps we have taken are as follows:

- 1) Partnership with All Means All to expand our knowledge of fostering inclusive communities and equitable outcomes for all students.
- 2) Expansion of MTSS services including dedicated reading intervention and math intervention teachers supported by an assistant principal of instruction and an instructional manager. This assistant principal also serves as the school's ILP-D coordinator.

- 3) Adoption and implementation of common, rigorous curricula across ELA, math, social studies, science, math intervention, and reading intervention.
- 4) Additional administrative support in the form of two assistant principals and four instructional managers. Our instructional leadership team supports English learner and ExEd populations through subgroup-specific supports, e.g. coaching and compliance for English learner and ExEd staff, and through training, developing, and supporting all staff in meeting the needs of English learners and ExEd students, e.g. training in assistive technology tools, implementing accommodations, and instructional strategies for diverse learners within and across content areas.
- 5) At the network level, we added a director of exceptional education instruction to strengthen our focus on ensuring both exceptional education teachers as well as general education teachers are planning and executing instruction using high leverage strategies for teaching students with disabilities.
- 6) Continued focus on English learners and ExEd populations that reflects our changing student demographic as demonstrated through augmented curricula, network support and training in the development of effective ILPs, ILP-Ds and IEPs, differentiated MTSS options for all students but specifically the English learners and ExEd subgroups, work with Formative Language Assessments as predictors of student success on ACCESS, and work with interim assessments as predictors of English learners and ExEd students' successes on TCAP.
- 7) Expansion of our family council to better incorporate family voice into our educational practices. Due to this feedback, we have invested heavily in socio-emotional support in the form of additional support staff dedicated to counseling and family outreach. We also incorporate interpretation services live and via Language Link to ensure that all families are able to have a voice in their child's education and the school's practices.
- 8) Collaboration with the network director of student support whose job is specifically dedicated to working alongside the school in pursuit of success with all students, but specifically with our student subgroups and most vulnerable student populations.
- 9) Investment in data-driven instruction services that function within our curriculum to align assessment strategies, culminating in predictive interim assessments.
- 10) Implementation of the Student Needs Assessment Protocol (SNAP) process that allows school teams to review academic, behavior, and attendance data to determine students with the highest need for support and the appropriate interventions to meet their needs.

Students that come to us with English as a second language arrive, on average, two to three years behind their grade level peers according to MAP. We have seen an increase in English learners, primarily those for whom Spanish is their first language, requiring us to rethink our ELA, math and EL practices at the school as we continue to integrate around EL students making up about 20% of our student body. We changed our ELA curriculum, developed a number of scaffolds within all our classes, and provided direct training to teachers around working with students who are second language learners. We also added a network EL coordinator to focus on EL compliance, allowing our director of English learners to more fully focus on instruction for multilingual learners.

LEAD Brick Church has seen an increase in students with low-incidence disabilities increasing from two students eligible to participate in TCAP-Alt in 2021 to eight students in 2023. This has led to enhanced programming in our AIM (lifeskills) classroom, including additional staff, specialized supports and related services, use of the Unique Learning System curriculum, and a sensory space. Each student has a personalized schedule in 2023-2024 that includes opportunities for AIM students to participate with their



peers in general education classrooms and social settings as per their IEPs. In 2022, 100% of tested students scored proficient on TCAP-Alt across all subject areas. In 2023, 100% of students tested scored proficient in TCAP-Alt ELA, with 83.3% scoring proficient in TCAP-Alt math, science and social studies.

## **CHRONIC ABSENTEEISM AND DISCIPLINE**

LEAD Brick Church has intentionally focused on school culture to set the stage for accelerated academic success. Reducing both chronic absenteeism and suspension rates has been a key area of focus for us this year and we are seeing positive trends in both metrics.

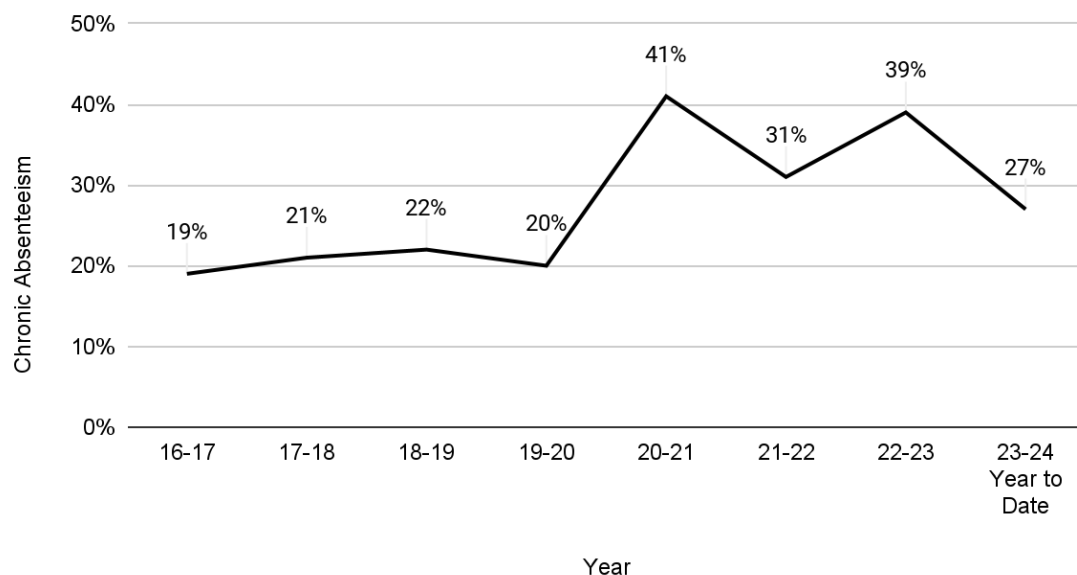
Prior to the pandemic LEAD Brick Church consistently had a chronic absenteeism rate averaging around 20%. During the pandemic chronic absenteeism peaked at 41%, well above the typical average. Brick Church is not alone in the struggle to encourage regular attendance; according to the CREDO State of the American Student released in Fall 2023, 72% of public schools nationally have reported significant increases in absenteeism since emerging from the pandemic, with at least 10% of students missing at least 5 or more days in a month in 2023. That is a 5% increase since 2020. Despite this national trend, we recognize that attendance has a direct connection with student outcomes and that we must do more to reduce our chronic absenteeism rate.

We have taken a multipronged approach to combat high chronic absenteeism rates at LEAD Brick Church. The first step is ensuring that we have a school team member who is completely focused on ensuring students have the incentives and supports to make going to school each day a priority. We found that having this responsibility distributed among multiple team members was not having a strong effect, so we have now hired a manager of chronic absenteeism (CA) at the school level and worked with them to design and implement a CA program that focuses on chronic absenteeism and the truancy process. While this individual leads the process, they work collaboratively with an attendance team composed of our Family and Community Engagement liaison (F.A.C.E.), principal, director of school operations, school counselors, and office manager. This team meets biweekly to review current attendance data, monitor progress of students in attendance interventions, and proactively identify an action plan for students in specific attendance risk categories (e.g. 3-5 absences, 6-8 absences, etc). In addition to the required attendance and truancy processes, the attendance team is responsible for planning and implementing a comprehensive incentive plan, including daily, weekly, monthly, and quarterly incentives for various groups (e.g. high-risk students, students in targeted attendance categories, students with perfect attendance, students maintaining 95%+ attendance, etc.).

We also recognized that while we have a strong data feedback loop in our instructional areas, that focus on data was missing from our approach to attendance. We found we were spending too much time focused on general daily attendance rather than focusing our attention most on students that were most likely to be at risk of being chronically absent. To combat this, we have invested in a learning platform called DeansList. All student attendance and family communication, including every phone call and text message, is housed in a single platform that allows our attendance team to quickly identify students who require the most support, track our outreach to the family and course correct, if needed. This program has significantly streamlined and improved our family communication and has allowed us to work with our families to impress on them the importance of school attendance as the determinant factor in their students' success.

Finally, we understand that students must feel motivated to come to school and that begins with strong interpersonal connections. Internal student survey data from fall 2023 reveal 81% of students responded positively to the comment, "I feel connected to my school community - like I belong." Eighty percent of students feel they have an adult in the school they know they can trust, while 87% feel their teachers believe in them. Overall, we are seeing these investments pay off, with current year chronic absenteeism down from 39% last year to 27% this year as of November 30th.

## Chronic Absenteeism by School Year



While we lead with encouraging families to make attendance a priority, we also follow the process of ensuring truancy compliance. Our process is as follows:

- One (1) to four (4) day(s) unexcused absences: The CA manager completes daily calls to the families of all absent students noting the number of absences as well as offering support and next steps to avoid missing more school.
- Five (5) days unexcused absences: We provide written notice, via a letter sent by email and mail, to the parent/guardian noting the number of absences and also provide information on Tennessee's Compulsory Attendance Law. At this point, our school counselor at LEAD Brick makes contact with the student and parent/guardian and includes our Family And Community Engagement (F.A.C.E.) liaison to ensure additional wrap-around services are not needed for the family.
- Seven (7) days excused or unexcused absences: The CA manager provides written notice, via a letter sent by email and mail, to the parent/guardian requesting a meeting to create a formal plan to ensure we can limit the number of future days out of school.
- Ten (10) days excused or unexcused absences the CA manager makes contact with the parent for each additional day out of school to ensure the parent knows how each additional day missing school will have a negative impact on the student's academic success.

While our expulsion rates have consistently remained below 1%, our suspension rates have remained unacceptably high; reducing suspension rates this year has been a significant area of focus for our school culture team this year. To reduce suspension rates we have adopted a proactive approach, including

establishing consistency in basic classroom procedures across the school, regular parent communications, restorative conversations with students, positive incentives and celebrations. We also established clear and consistent expectations and consequences, as established in the LEAD culture policies and practices. Our proactive approach and clarity of expectations are coupled with providing Tier 2 behavioral interventions and a shift in how our student behavior support team operates. We emphasize the development of positive behaviors that improve classroom performance, goal setting and monitoring with students, and self-reflection. Our team has focused on Tier 2 behavioral interventions and worked to move student behavior support to be less punitive and more concentrated on development of positive behaviors to improve classroom performance. Student Support Team members are encouraged to consider alternatives to out of school suspension, limiting suspension primarily to significant safety issues. This focus is resulting in very strong outcomes, with suspension rates halved from the prior year, reducing from 23% to 10.5%. At the same point in the school year last year, our suspension rate was nearing 20%; based on this trend, we anticipate our 23-24 year end results to be significantly improved from the prior two years. Our year to date expulsion rates are up due to a couple of zero tolerance and significant safety-related offenses this year but these have been a significant aberration in our track record of low expulsion rates and we do not believe this trend will continue.

Finally, an important tool to proactively address both attendance and behavior issues is our LEAD MTSS/SNAP framework, which has been fully adopted this year. We use this process to identify and intervene with students who are at risk for attendance, behavior, and/or grades. Prioritized areas for us include attendance (via attendance team interventions) and behavior (interventions come from the school leadership team, the student support team, grade-level teams, and individual teachers). Data is reviewed whole-school in the middle of each quarter with checkpoints on a regular basis throughout the 9-week intervention cycle. See section 1.3 above for additional information about the SNAP process at LEAD Brick Church.

<b>LEAD Brick Church</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024 (Current as of November)</b>
Suspension Rates	29%	7%	26%	23%	11%
Expulsion Rates	.8%	.3%	.3%	.4%	1.7%

### **Future Performance Goals**

2023-2024 goals were set by both the ASD and the LEAD Brick Church leadership team. Those goals are to increase the school's overall success rate to 20%, return to a level 5 TVAAS, reduce the school's suspension rate to under 20%, and reduce chronic absenteeism to less than 26%.

Long term, our overarching goal is to meet or exceed standards on the TPCSC framework in every category. Specifically, our long term goals include:

- **Success Rate:** Within three years, LEAD Brick Church will achieve a Level 3 in the TN State Performance Framework for success rate. LEAD Brick Church will achieve a Level 4 or 5 within five years. Specific proficiency targets will be set for each grade and subject area each year as the state announces cut scores.

- **Growth:** LEAD Brick Church will return to and sustain TVAAS level 5 overall composite growth and for students scoring within the bottom 25% every year.
- **Chronic Absenteeism:** Chronic Absenteeism will return to pre-pandemic levels to under 20%. As chronic absenteeism is a critical metric, it will serve as the school-specific goal.
- **Comparative Performance:** LEAD Brick Church students will achieve proficiency levels within three percentage points of our local school district within three years and will perform at or above district performance within five years in both math and ELA.

To achieve these long term academic goals, we also set internal metrics that allow us to monitor our progress towards our year end goals. These internal goals include:

- **Reduction of differentials among subgroups and all students to 5% or less:** We are laser focused on increasing overall student achievement while ensuring students within each subgroup receive the support needed to meet or exceed the performance of their peers in the “all students” category. We will do this through targeted professional learning for teachers focused on lesson planning with diverse learners in mind. We will monitor our progress towards our goal through analysis of IA data as well as through analysis of MAP data and our progress towards growing our students in the lowest quintiles at a rate well above their expected one year growth goal.
- **Reduction of students in tier 2 and tier 3 intervention in reading and math:** Expanded math and reading intervention programs have allowed us to engage more students in intervention to build essential foundational skills in reading and math. We will meet our goal of increasing the percentage of students exiting Tier 2 or Tier 3 reading and/or math intervention by 5% each year. Key to success in reaching this goal is in depth training in the components of our reading and math intervention curricula as well development of strong knowledge of essential reading and math skills.
- **Sixty-five percent or more of students will meet their individual growth goals (IGGs) on MAP:** After each administration of MAP data are reviewed not only to determine individual student progress towards meeting growth goals, but also to analyze the percentage of students within each quintile. Through reading and math intervention, it is our expectation that we will increase the percentage of students meeting yearly growth goals and, in turn, increase the percentage of students demonstrating proficiency at or above grade level as compared to their peers nationally.
- **Sixty-five percent or more of students will reduce their needs score in the Student Needs Tracker:** LEAD’s Student Needs Tracker provides school teams with student data in the areas of grades, attendance and behaviors. In essence, it serves as LEAD’s early warning system. Each student is assigned a student risk score based on their need in each of the areas listed above. School teams engage in the Student Needs Assessment Protocol (SNAP) process to determine students with the highest needs and to choose interventions to address those needs. Data are analyzed each mid-quarter, and progress toward meeting intervention goals is monitored and reviewed at each meeting. Based on student success, interventions can remain in place, be discontinued, or be revised.

Finally, to truly achieve our mission, our students must be not just college-ready, but also prepared for life. To monitor our progress towards our mission, we set internal school and staff culture goals. Those include:

- **Suspension rate and expulsion rate:** LEAD Brick Church will suspend less than 20% of its students and expel no more than 1%. We will do this by offering a number of alternatives to suspension within the school day, partnering with families to impress upon them the importance of our school expectations, and working

with teachers and students to create positive and meaningful relationships that will contribute to decrease in suspension rates and maintain low expulsion rates.

- **Student attrition rate:** Our goal is to retain 85% of students whose primary address remains in our geographic zone and to retain at least 77% of students overall. See the Recruitment section below for details on our plan to limit student attrition.
- **Teacher retention rate:** Our goal is to retain a minimum of 75% of teachers year over year. See the Personnel section for our focus on retaining highly effective teachers.
- **80% of families successfully engaged** (one touchpoint a year) and **60% meaningfully engaged** (at least three touch points a year)

LEAD utilizes the nationally normed NWEA MAP assessment to monitor student growth toward grade level proficiency. This has given us insight into performance trends when TNReady was interrupted. MAP assessments are administered three times during the year - fall, winter and spring.

See below for MAP growth data during and after the period of pandemic-related remote learning. To close the achievement gap, our students must make more than one year's growth in both ELA and math each year. During the height of the pandemic in the 2020-2021 school year, we saw student growth on the MAP assessment range from 1 to 2.16 years in reading and from .75 to 1.25 years in math. We then saw accelerated growth in the 2021-22 school year, which has resulted in making up a portion of pandemic related learning loss. In ELA, we saw growth of between 1.25 and 2.48 equivalent years, and we accelerated our growth from prior to the pandemic in every grade level. In math, we saw a minimum of .88 years growth in 8th grade to a max of acceleration of 1.34 in 6th grade. We did not see the same rate of acceleration as ELA, nor did we achieve the growth necessary to meet our achievement goals. These results, along with Math TNReady Results, were a primary driver of the determination to adjust our coaching staffing to better support our teachers in their specific content area.

<b>LEAD Brick Church: AVERAGE YEARS OF GROWTH - NWEA MAP READING</b>				
<b>Grade</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>
<b>5</b>	1.17	No spring data	1.5	1.87
<b>6</b>	0.67	No spring data	2.16	2.48
<b>7</b>	1.83	No spring data	1	1.25
<b>8</b>	0.83	No spring data	1.67	1.956

<b>LEAD Brick Church: AVERAGE YEARS OF GROWTH - NWEA MAP MATH</b>				
<b>Grade</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>
<b>5</b>	0.875	No spring data	0.875	1.03
<b>6</b>	0.875	No spring data	1.25	1.34
<b>7</b>	0.625	No spring data	1	1.16
<b>8</b>	1.125	No spring data	0.75	0.88

Each year, the Network Academic Team, School Leadership Team, and head of schools collectively review the school's academic data using NWEA MAP (used as LEAD's universal screening tool), Fastbridge, LEAD Network Interim Assessments, TNReady and other appropriate data points mentioned in our assessment strategy, including student survey data, to set the academic goals for the following school year. These stakeholders review comprehensive, subgroup, grade-level, and individual student data to set goals for growth and achievement. Throughout the school year, the Network Academic Team, School Leadership Team, and head of schools frequently monitor progress toward these goals using specific data protocols and provide regular reporting at the school, network and board levels. If data for individual students or for any given subgroup is not on track for success towards meeting set goals, analysis for root causes for lack of progress is conducted and interventions are implemented.

If LEAD Brick Church were to fall below state and/or LEA academic achievement expectations, LEAD Public Schools network leaders would work closely with the school principal to identify areas of concern, then develop a plan of action to address any deficiencies. If the school is not meeting the benchmarks, the school leaders will work with teachers to make changes in classroom instruction and provide additional intervention. Teacher support may include additional coaching, professional development on instruction and content, or whatever the leadership team decides is needed for the teacher to meet expectations. The plan might also include additional support from members of the LEAD network's Academic Team to work closely with school-based leaders in targeted areas; close monitoring of standards-aligned instruction in all tested subjects; additional staff to run intervention and other support groups; as well as additional financial resources if deemed appropriate. If attendance is lagging or suspensions are above the benchmark, more intensive behavioral interventions will be used with students identified for support with the understanding that parent involvement is key in ensuring students are regularly attending and positively engaging in school. Finally, if it is determined that personnel changes need to be made, network or school leaders would develop a plan to address that issue.

### *1.5 High School Graduation and Postsecondary Readiness (high schools only)*

*In this section:*

- (a) Explain how the school ensures all students meet Tennessee graduation requirements in accordance with State Board policy 2.103.*
- (b) Provide any evidence of how the school monitors the effectiveness of its graduation requirements to ensure student readiness for college or other postsecondary opportunities (i.e., trade schools, community colleges, military, or workforce).*
- (c) Outline systems or structures the school uses to assist students at risk of dropping out and/or not meeting graduation requirements.*

Not applicable.

### *1.6 Assessments*

*In this section:*

- (a) Identify the primary internal assessments the school uses to assess individual student and sub-group learning needs and progress throughout the year. Explain how these internal assessments align with the school's curriculum, performance goals, and state standards.*

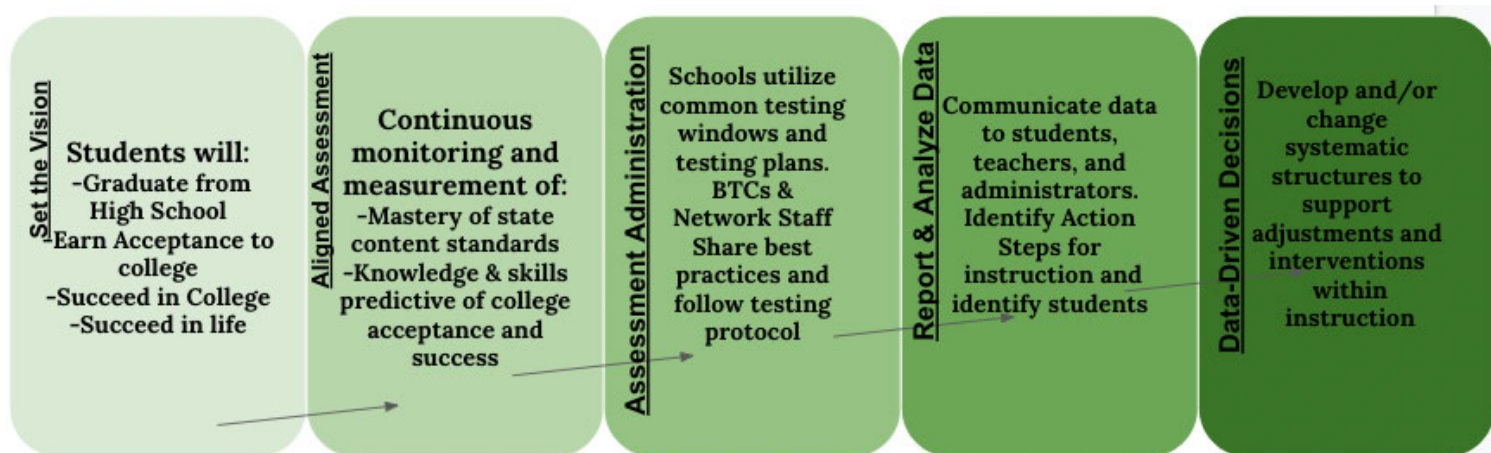
(b) Explain how the school collects and analyzes student academic data and uses it to inform instruction and professional development for teachers.

At LEAD Public Schools we believe the purpose of assessment is to gain insight into student understanding. Effective assessment should make student thinking visible and require teacher and student response and action. LEAD Public Schools defines assessment in three ways: *of*, *as*, and *for* learning.

A key to quality assessment is that students are users of their own assessment data. Therefore, we ensure students understand the purpose of every assessment they take. Teachers and school leadership communicate purpose and results to students so students can maintain an active role in their own progress.

Another aspect of quality assessment is analysis and use of data to improve instruction. We believe that an assessment should only be administered if the data will be useful in improving instruction for students. Therefore, every assessment we administer has a data analysis and action component. Below we outline our assessment strategy categorized by assessment type and describe the purpose, the student and teacher roles, and how we use the assessment data to impact instruction.

To execute upon our Philosophy of Assessment, we follow the Assessment Strategy below, which broadly describes how we ensure that our assessments actually fulfill their intended purpose.



LEAD Brick Church depends on an extensive assessment system in order to inform instructional practice, evaluate teacher effectiveness, and design and implement professional development. Assessments, both summative and formative, are given throughout the year and leveraged immediately by staff to enhance academic outcomes for students. Below is an overview of the major assessments given at LEAD Brick Church, as well as how data from assessments are utilized to inform school level decisions.

**TCAP:** TCAP assessments are taken at the conclusion of each year, and growth and achievement data are thoroughly reviewed for trends across subjects, grade levels, and subgroups. The findings from this review dictate the school-wide focus and goals for the coming year. These goals are reflected in the internal professional development calendar as well as in instructional coaching and ongoing data analysis priorities. For example, scores in both math and English led to a curriculum audit and review during the 2020-21 school year in an attempt to find a curriculum for both subjects with rigorous materials in addition to culturally relevant text.

**Measure of Academic Progress (MAP) reading and math tests:** LEAD Brick Church students in grades 5-8 take the NWEA MAP assessment two or three times a year, always at the beginning and end of the year. In some years the, Winter MAP administration has also been given. The data from this assessment reveals how students perform in comparison to their grade-level peers across the country, specific skills with which they struggle and excel, and how students grow from test to test.

We utilize data from MAP assessments to ensure heterogeneous groupings of students within classes to make sure that all classes include students who are performing below, at, and above the grade-level norm. Throughout the year, MAP data is used to inform small group instruction within classes and placement in tiers for reading and math intervention. Teachers, alongside their instructional managers, analyze gaps that students demonstrate along the learning continuum from NWEA and target those gaps through small group instruction. The learning continuum shows specific areas of need by student and subject area. This information forms the basis of small group plans and expectations for scaffolding instruction. Finally, MAP scores serve as a universal screening tool to determine intervention placement.

**FastBridge:** FastBridge uses Curriculum Based Measures (CBMs) to quickly assess student performance on foundational reading and math skills. During the screening windows, which occur during the early fall, winter, and spring, students are assessed on specific skills on grade level or at the highest level available, to measure growth over time compared to same-age peers and the overall effectiveness and impact of intervention. Grade-level FastBridge screening is also used as a secondary screener to place students in appropriate interventions. FastBridge is also used for progress monitoring. Students in math and reading interventions are assessed on their instructional level to measure growth overtime and ensure the intervention is working effectively for each student. Typically, these assessments occur every two weeks, with an analysis of student growth at least once every quarter. Students can be measured on a variety of skills and assessments in Basic Reading, Reading Fluency, Reading Comprehension, Math Calculation, and Math Problem Solving. Secondary screening and diagnostic data are used to place students into the appropriate assessment(s), aligning with the intervention and skill gaps for each student.

**Network Interim Assessments:** Network Interim Assessments (NIAs) are administered to students two to three times per year as an opportunity to see how students demonstrate knowledge and skills on high-leverage standards in ELA and math. NIAs are currently developed by Mastery Connect in collaboration with network core content directors to be predictive of TNReady/EOC exam success. Due to their predictive nature, timely data analysis paints a picture of predicted student performance on the end of year assessments. The NIAs are given at the same time across the LEAD network to allow for thorough data analysis and shared best practices among teachers and leaders at different schools. At LEAD Brick Church, NIA data is analyzed within two weeks of administering the assessment. Instructional managers work individually with ELA, math, and science teachers to determine student misconceptions and plan reteaching opportunities. Also, NIA data is paired with MAP data to predict whether students are on track towards proficiency on TNReady. This information supports small group instruction and changes in remediation groups. Remediation groups are formed based on FastBridge Math and Reading assessments administered at the beginning of the year to dictate groupings. NIA data works in conjunction with other assessments to determine small group settings, in both a general education and intervention class.

**Exit Ticket Data:** LEAD Brick Church teachers regularly use exit ticket data to evaluate student learning between classroom summative assessments. These formative data pieces provide teachers with information as to which students were successful with the day's learning outcomes. Teachers use exit tickets several times per week to ensure that students master content and take immediate action in the next lesson. This exit ticket data is shared



with students the following day and teachers are able to highlight and correct misconceptions based on this data. The process of using exit ticket data as a formative assessment ensures that student misconceptions are addressed before the classroom summative assessment.

**Formative Language Assessments (FLAs):** LEAD Brick Church utilizes a systematic process of language analysis that provides students and teachers with feedback on students' progress toward specific instructional goals for using English. FLAs are given in four rounds and inform Individual Learning Plan (ILP) Updates. ILPs are updated quarterly per State Rule 0520-01-19. Teachers utilize FLA data to determine a student's progress towards their WIDA ACCESS growth goals. FLAs are reviewed at both the network and the school level to shape professional learning for EL teachers and to inform necessary instructional changes.

**WIDA ACCESS:** ACCESS scores are used in a variety of ways to assess programmatic success and inform instructional decisions for English Learner (EL) students. Instructional leaders at LEAD Brick Church review ACCESS scores by domain and across teachers, as well as look at the percentage of students who met their growth goals on ACCESS and the percentage of students who exited out of English learner programming. Student overall scores dictate placement of individual students in classes, with students scoring lower than a 2.5 considered Entering or Emerging and requiring special programming of sheltered English language development. These students receive specific classes targeted at the requisite language skills needed to successfully access grade-level academics. Additionally, course supports are determined by ACCESS scores. Students are placed into appropriate classes for their levels and their scores help dictate the supports offered in academic classes. In addition, these scores dictate the school's areas of focus which inform professional development for staff. Finally, LEAD Brick Church adopted the philosophy that teaching with English learner strategies benefits all students; thus, whole-staff professional development focused on English learner strategies consistently appear in the professional development calendar.

**Avant:** Avant is a language proficiency test similar to ACCESS, but measures students' proficiency in a world language, like Spanish. The test measures students' ability to listen, speak, read, and write in a world language. Bilingual/multilingual 8th graders take this test for two reasons: 1) a mid-intermediate score or higher allows students to earn high school Spanish credits by exam. This sends our students to high school with more opportunities in their schedule for electives, required intervention classes, and accelerates them towards graduation. In the 2022-23 school year we promoted ten eighth graders that earned two world language credits. 2) a mid-intermediate score or higher PLUS high performance on an English proficiency exam (e.g., TN Ready, ELA Semester Course Grades, and WIDA ACCESS) can potentially qualify students for the Seal of Biliteracy Pathway. In May 2023, LEAD Brick Church awarded its first students the Seal of Biliteracy Pathway Award with nine students qualifying. We offer Avant testing windows three times a year, but the majority of testing is done in November.

**Grades:** In addition to network and state-normed assessments, students also take in-class assessments. Assessment data helps inform more consistent instructional decisions and informs the students' grades. In addition, it allows teachers and members of the leadership team to communicate with families of struggling students. If a student is failing, families are notified weekly. If a student fails two or more classes for the quarter, a meeting is held to discuss performance and determine support moving forward.

When evaluating the effectiveness of our academic program, LEAD Brick Church utilized a variety of academic data sources including TNReady, TVAAS, and ACCESS results, as well as formative data including MAP, Network Interim Assessment results, and unit-level data. LEAD Brick Church also used attendance data, discipline data, and

school climate survey data as measures of school health to ensure that we created a positive school environment for an effective academic program.

### **Assessment Management, Coordination, and Analysis**

The Network Academic team manages and coordinates administration of all common assessments in the network. The network director of evaluation and assessment attends state and district assessment meetings and uses that information to construct assessment plans. From there, they collaborate with the school's assistant principal of instruction (API), building testing coordinator (BTC), and instructional managers to implement school specific plans.

The Network Data and Academic Teams collaborate to conduct high-level, network analysis for each of our assessments using Looker Studio. This program enables the team to conduct analysis of more than one assessment to look for correlations and trends across the network. These analyses are shared with network leaders for decision making and goal tracking and with school leaders for comparison and goal tracking. The Network Academic Team also coordinates and trains school leadership teams on methods of analysis and protocols for decision making.

### **Additional Sources of Data**

At LEAD Public Schools, we believe that academic data and culture data are closely connected. To that end, we ensure that teachers have access not only to the assessment data outlined above, but also to important information regarding student attendance and behavior through use of DeansList. Conversations related to individual student achievement include both assessment analysis as well as the potential role attendance and behavior may play on the student's overall achievement.

### **School Level Data Analysis Cycles**

**Screeners and Progress Monitoring.** We use MAP as our universal screening tool for reading and math. This is administered at the beginning, in the middle, and at the end of each year to monitor student progress. MAP results are initially used to create student roster groupings and identify students for further screening and interventions; we then monitor progress toward our goals of 1.5+ years of growth via the mid and end of year test administration. FastBridge (reading and math) and PWRS (reading) are administered to students who fall below the 40th percentile to determine level of need for additional interventions. Students in reading and math interventions have progress monitoring via FastBridge weekly for Tier 3 and biweekly for Tier 2. Progress monitoring data is reviewed monthly with instructional leaders and interventionists to determine student progress and adjust instruction accordingly. Instructional leaders conduct formal fidelity checks twice per quarter in intervention classes and coach interventionists to a minimum of 80% fidelity to the intervention curriculum. Each quarter intervention teams complete data analysis to adjust instruction and to adjust student groupings based on progress.

**Instructional Data.** Teachers and leaders at Brick use the LEAD Public Schools interim assessments through MasteryConnect as a foundation for our instructional data collection and analysis protocols, administered three times per year. This allows us to measure progress toward proficiency for all students and for our subgroups and make quarter-long adjustments to instructional priorities.

Throughout each quarter, teachers and instructional leaders use mid and end of unit assessment data to make adjustments within the unit and to provide additional reinforcement or reteaches during data response days in the pacing calendar, Do Nows, and/or spiral reviews. Instructional managers also use this data with teachers as they

complete unit preparation for each new unit to determine and plan for any areas of emphasis for review skills or concepts.

Each week, our teachers and co-teachers complete stack audits of student work and/or exit tickets, during which they look at the qualities of the work in comparison to an exemplar and make decisions about how to adjust the next day's lesson. Instructional leaders model, coach, and support teachers in the process to build content knowledge and teachers' capacity to see and respond to instructional data in ways that move students forward each day.

Instructional data analysis goes hand in hand with instructional planning. Our teachers and co-teachers plan weekly with support from school and/or network staff, including planning for students with diverse learning needs. During planning meetings, instructional leaders build content and pedagogy knowledge. This planning process is informed by the instructional data collected through stack audits, quizzes, and unit assessments.

Intervention staff utilize data from student screeners, which are administered at the beginning, middle, and end of the year to make adjustments to student intervention placements. Progress monitoring data is reviewed during monthly meetings and/or coaching sessions, with clear benchmarks for growth that are used to determine any potential movement of students between intervention groupings. Weekly (Tier 3) and bi-weekly (Tier 2) progress monitoring data, along with observation data and/or fidelity check data, is used to make instructional adjustments to lessons and teaching strategies.

All of this data and planning is then used by our instructional leaders to adjust their schedules and focus areas for teacher coaching and support. Instructional leaders observe, live coach, and assist students based on the teacher's action steps, teaching data, and student performance data.

**Culture Data.** LEAD Public Schools uses DeansList as a primary tool for recording and analyzing student culture data. This data is analyzed by our culture leaders, student support team, and instructional leaders on a regular basis. Data analysis includes staff-focused data (positivity ratio, referrals by teacher, grade level trends, communication data) and student-focused data (positivity ratio, referrals by student, silent lunches earned, grade level trends).

Instructional leaders review data with their teachers to ensure that positivity ratios are high and that any issues reflected in referral data are addressed (e.g. specific classes that would benefit from push-in support, students who need a restorative conversation / call home, etc.). Our culture leader and student support team members review data for high frequency locations, times, staff, and students on a biweekly basis. Each round, they make adjustments to their schedules and support priorities to address areas of need.

At the middle of each quarter we run the LEAD Public Schools Student Needs Assessment Protocol (SNAP). The SNAP process analyzes student risk levels for attendance, behavior, and grades according to common network-established criteria. Each round begins with our SNAP leadership team (school leaders, school counselors, family engagement coordinator, and network MTSS staff) unpacking the school data to identify bright spots and trends in the data, as well as the school actions that contributed to the bright spots and trends. The SNAP leadership team then identifies key Tier 1 actions that the school will take for the next nine week cycle, e.g. adding new attendance incentives or refining the gradebook check process with instructional leaders. School-level data highlights and trends, individual student celebrations, and Tier 1 school actions are shared with the full staff.

The SNAP leadership team also assumes responsibility for creating and implementing intervention plans for the students at the highest levels of risk for a) all categories and b) behavior. After this, grade-level teams meet to

complete the iSNAP (individual SNAP) process. In this process, teams of teachers and support staff identify students with high risk in all categories or at the highest level of behavior risk, then develop interventions and assign implementers. The student support team takes students with Tier 3 behavior needs and provides customized, higher intensity interventions and incentives to promote appropriate behavior.

LEAD's MTSS team provides resources for identifying hypothesized student needs and interventions to meet those needs. All information regarding interventions is recorded in the SNAP Tracker and is revisited in the middle of each quarter. Intervention owners, especially those on the school leadership team, use customized DeansList reports for their personalized intervention group rosters to monitor progress, engage in reflections with students in their intervention groups, and celebrate success and progress with students.

During biweekly grade-level team meetings, each grade level's iSNAP facilitator leads an agenda that includes time for sharing bright spots about student growth, strategies to more effectively serve students including diverse learners, and other grade-level specific items related to the culture and academics within the grade. One of our school leaders and members of the student support team (student support coordinators and/or counselors) sits on each grade-level team to provide connections to each team in the building.

**Student Data.** At Brick, we are committed to engaging with students in their own data. Teachers share data and celebrate progress with students during reading intervention classes/progress monitoring, after class assessments, and even after turning around stack audits to highlight the qualities of student work and growth that they are making in their grade-level skills.

All school staff and students are engaged in Individual Growth Goal (IGG) data conferences, which occur approximately every month through the CREW sessions on Wednesdays. School staff team up to work with specific CREW groups. Prior to IGG conferences, staff pull data from the LEAD Student Data Dashboard including attendance, behavior, grades, and at specific times of the year, assessment data (MAP, IAs, etc). This data is then shared with students using a data reflection template during the IGG Crew Conferences. Students reflect on their data and identify key areas of strength and one area for growth. They then work with the adult to set a goal for the next IGG conference (e.g., miss no more than 1 day of school; improve positivity ratio to 3:1; improve grade in a class to X%). Students then name ways that school staff can support them in reaching their goal by the next month and set a schedule for checking in on progress toward the goal. This data is recorded on the IGG conference logs and revisited each month to celebrate success and set new goals.

We also conduct a LEAD Public Schools student survey in the fall and spring to assess, analyze, and create action plans about student experiences and perceptions of the school. This data is shared with the school team after each administration and our leadership teams use it to guide strategic actions in the building. For example, to improve students' perception of the school as a joyful place, our leadership team has intentionally calendared more events and incentives, including events that were suggested by students and teachers.

**Leader Data.** Brick Church's leadership teams use a set of recurring data cycles to guide our work in achieving the annual school goals for academics and culture. All data cycles are guided by the school scorecard, a comprehensive set of data metrics for all LEAD middle schools including academics (e.g. TCAP, MAP, unit assessments, Formative Language Assessments, RTI progress monitoring and screening data, teacher observation data, teacher action step progress, strong start/instructional strategy implementation data, etc.), culture (e.g. suspension rate, referrals by teacher/student, positivity ratio, silent lunches earned, student survey data, staff survey data, etc.), and operations (daily attendance rates, chronic absenteeism rates, chronically absent students,

students at risk for attendance, enrollment, family engagement, etc.). Scorecard goals are consistent with the goals listed in this application.

Our school leadership team members (principal, assistant principals of instruction, assistant principal of students, director of school operations, family and community engagement coordinator) regularly engage in a radical problem-solving process learned in the All Means All training. This process includes reviewing the data for each person's assigned metrics in weekly 1:1 meetings with the principal, identifying bright spots and hot spots, and establishing one area for potential problem solving with the larger team.

When the school leadership team meets each week, every leader shares their bright spots and most urgent challenge for the week as it pertains to the school's metrics. The team then determines one to two challenges for the day and engages in a problem-solving protocol to identify immediate actions that will address the challenge at hand and allow for progress within a week. Leaders then revise their schedules and tasks to ensure that they are prioritizing the right work for themselves and their teams in the upcoming week.

As a result of this process, our team is able to make quick traction on school challenges by leveraging the collective talents of the broader team and narrowing our focus to the most important, urgent work that moves us toward our school goals. As we deepen our expertise with this protocol, we are also launching implementation of radical problem-solving strategies with our instructional leadership team, student support team, and grade-level teams.

Other recurring data processes used by school leadership team members are mentioned elsewhere in this application, including the mid-quarter MTSS SNAP process (section 1.3), the biweekly attendance team process (section 1.4), and use of weekly data meetings to drive incremental progress in instruction (section 1.3).

### 1.7 School Calendar and Schedule

*In this section:*

*(a) Explain why the academic calendar and schedule developed is best for student learning, including any enrichment and non-core classes. Summarize how the school provides required student services and tiered interventions in its school day.*

*(b) Describe how the school will comply with all summer programming required under the Tennessee Learning Loss Remediation and Student Acceleration Act.*

LEAD Public Schools designs its network calendar to meet the following criteria: provide ample instructional time during the school year; maximize school-based and cross-network teacher collaboration and Professional Development (PD), and, where appropriate, mirror Metro Nashville Public Schools, in order to support our parents and families with students attending a LEAD and MNPS school.

This schedule is optimal for student learning because it provides the necessary time to fully implement our instructional and school culture program. The academic calendar allows students to engage in a balance of core classes, electives, remediation, enrichment, and intervention based upon their unique needs. Homeroom provides time each morning for our students to get in the mindset for learning, and each week students engage in CREW. A variety of electives foster students' abilities to pursue individual interests. Double-blocked core content classes offer increased opportunities for focus on grade-level standards. Additional reading intervention and electives are scheduled simultaneously to ensure students have access to intensive instruction as needed. This allows intervention and enrichment courses to be provided across grades as well as fluidity in student placement.

Professional development days incorporated in the calendar provide opportunities for teachers to come together to receive training relevant to increasing student outcomes in their content areas. We also prioritize LEAD University, our summer professional development that onboards new employees and rallies all staff around our network mission. This professional development typically lasts three to four weeks and is composed of trainings and workshops for all members of our staff.

Furthermore, the school year and school day has been configured to prioritize key components of our tiered student interventions, as follows:

### **Response to Instruction and Intervention (RTII)**

Tier I instruction occurs in the general education classroom. LEAD designs core instruction to provide access to and differentiation of the grade-level content so all learners can be successful. Along with core instruction, all students have the opportunity to attend after school tutoring for additional support in mastering the core content.

In addition to supporting students who are already identified as diverse learners, LEAD Brick Church supports students who are not making progress through the RTII process. For grades 5-8, the MAP assessment is used as the universal screener to determine

students who need additional support. From those universal screeners, students who score below the 40th percentile are identified for additional testing to determine their skill deficits. These students are given fluency testing through FastBridge to determine if they are fluent readers on a particular grade level or if their skill deficit is in comprehension. A similar process occurs using FastBridge assessments for math to determine if a student is struggling in computation or number fluency. Once gaps are identified, students are placed into small groups with other students with similar skill gaps. They receive intervention in these small groups from 30-45 minutes per day. These FastBridge screeners are given every quarter to restructure intervention groups in between administrations of the universal screening tool, MAP. By identifying gaps that students have in their prerequisite skills and addressing those gaps through small group instruction, LEAD Brick Church supports students who are not making progress on grade-level material.



### **Expanded Reading Intervention**

LEAD Public Schools has identified foundational reading skills and grade-level reading fluency as key areas of impact to increase student achievement and growth in order to fulfill our mission of preparing all students to be *ready for college and ready for life*. Research shows that “fluent reading is the strongest predictor of comprehension on the NAEP” and other standardized assessments (Sabatini et. al, 2019). Because foundational reading skills and reading fluency are not explicitly taught or measured in the general education ELA classroom, and our students come to us with significant skill gaps in these areas, we developed and support a robust reading intervention system to address our student’s needs and support them in closing the gap to grade-level proficiency.

At the middle school level, SRA Corrective Reading is used to provide intensive direct instruction-based reading intervention for students who are reading below grade level. This direct instruction reading intervention program delivers tightly sequenced, carefully planned lessons that give struggling students the structure and practice necessary to become skilled, fluent readers and better learners. The program is research-based and highly scripted. Students are placed in different levels of SRA Corrective Reading intervention based upon their identified needs. In Tier 1 intervention, students engage in lessons from Match Fishtank ELA, with a focus on nonfiction texts. Reading intervention classes range from 39-44 minutes each day.

### **Math Intervention**

LEAD Brick Church has math intervention five days a week at the beginning of their math blocks for 25 minutes with a total of 125 minutes of intervention weekly. Foundational skills in addition, subtraction, multiplication, division, and fractions are addressed in Tier II and Tier III instruction using Do the Math. Students receiving Tier 1 intervention use IXL. Teachers select specific math standards to address with students weekly to close gaps using IXL. Students take an IXL diagnostic that guides them through various math standards at the grade level they test on to address deficits in math content knowledge.

At LEAD Brick Church, summer programming is available for all students meeting the requirements for participation through the Tennessee Learning Loss Remediation and Student Acceleration Act. The goal of summer programming is for students to receive additional support to make up for learning loss and academic struggles by being engaged in enriching activities throughout the summer months. Students who attend receive additional instruction in Literacy and Numeracy are provided with target intervention and enrichment and participate in a variety of elective classes.

LEAD Public Schools believes strongly in developing leaders; thus, summer school is typically run by an assistant principal of instruction (API) who has been identified as having high potential to become a principal. The API is supported by instructional managers, teachers, and network staff. Students are provided with transportation to and from summer programming, and families are expected to complete a letter of agreement for participation and attendance. Summer school programming is currently offered 5 days a week for four weeks, with six hours a day of instruction. Daily programming includes 4 hours of reading and math instruction (with at least one hour of this block dedicated to math and at least one hour for reading), one hour of intervention, and one hour of physical activity or “play.”

### **1.8 Special Populations**

*NOTE: Unlike the ASD, the Charter Commission does not have the statutory authority to compel local school districts to provide services to students with disabilities, English Learners (EL), or other special populations. Each charter operator may attempt to contract with a local school district or other partner to provide services, if needed, but the charter operator bears all responsibility to establish any such agreements.*

*In this section:*

- (a) Describe how the school currently oversees special populations, including the members of*

*the leadership responsible for overseeing the work. What services do you currently contract out and what contingency plan do you have in place for the potential transition to the Commission? If you are currently contracted with the district of residence to receive support in providing services, what will the school's contingency plan be if authorized by the Commission and lose access to district services?*

*(b) Describe the following related to students with disabilities:*

- i. Specific instructional programs, practices, and strategies the school employs to provide a continuum of services, ensure students' access to the general education curriculum, and ensure academic success for students with disabilities and note any changes to the school's plans under the Charter Commission. Describe any programmatic or contracted services that will change if authorized by the Charter Commission.*
- ii. The current staffing to support students with disabilities;*
- iii. How the school monitors and evaluates the progress and success of students with disabilities.*

*(c) Describe the following related to EL students in accordance with [State Board Rule 0520-01-19](#):*

- i. How the school identifies EL students, including how students are screened;*
- ii. The specific instructional programs, practices, and strategies the school employs to ensure academic success and equitable access to the core academic program for EL students;*
- iii. The current staffing to support EL students and how the school meets the 1:35 teacher-to-student ratio;*
- iv. How the school implements individual learning plans (ILPs) for all EL students; and*
- v. How the school monitors and evaluates the progress and success of EL students, including exiting students from EL services.*

Support for special populations exists at both the network and school level.

The director of exceptional education (ExEd) instruction and the director of ExEd compliance work as a part of the Network Support Team (NeST), specifically supporting exceptional education programs at each LEAD campus. The directors are responsible for setting the vision for exceptional education at the network, ensuring the development and fidelity of academic programming for all ExEd students, the development and training of all instructional staff in how to drive outcomes for ExEd students, and ensuring compliance with all laws and regulations related to exceptional education students.

The director of English learners (EL) works as a part of the Network Support Team (NeST), specifically supporting English learners at each LEAD campus. The director is responsible for setting the vision for English learners at the network, ensuring the development and fidelity of academic programming for all EL students, the development and training of all instructional staff in how to drive outcomes for EL students, and to ensure compliance with all laws and regulations related to English learners. The director of EL manages a network EL coordinator, who promotes and supports EL instruction and provides recommendations that support compliance for EL policies and procedures. At the school level, all ExEd teachers and EL teachers are managed and coached by an instructional manager.

LEAD Brick Church does not contract with MNPS or the ASD for special population services. LEAD contracts with a third party provider for exceptional education contracted services, including speech and language therapy, occupational therapy, physical therapy, and psychological services. LEAD also



contracts, and has a close working relationship with, local special day schools for any students who require outplacement services. The relationship with these vendors are unrelated to the authorizer and will not be impacted by the transition to the Tennessee Public Charter School Commission.

Provision of excellent service to diverse learners is a key component of LEAD Brick Church's academic program. In 2021-22, 18% of LEAD Brick Church students had Individual Education Plans (IEPs). This number has remained fairly consistent over the last three years. Additionally, LEAD Brick Church had 23% of students in the EL program (active-monitored year 4). LEAD Brick Church celebrates the diversity of its student body, inclusive of students with different learning abilities and various language and cultural backgrounds. LEAD Brick Church is committed to ensuring all students in the building have equitable access to high-quality instruction.

Fundamental to diverse learner support is increased communication. Within the school building, communication concerning student performance and support occurs on a weekly basis during grade-level team meetings. Teachers also provide formal communication concerning student performance in ILPs and IEPs. In addition, consistent communication between teachers and families is paramount. This is evidenced through frequent teacher communication by phone, email, or through two-way messaging through DeansList and more formally through IEP and ILP communication. Families have access to their children's grades through the parent portal from our gradebook.

### **Students with Disabilities**

The exceptional education (ExEd) instructional manager, in conjunction with the principal, assistant principal of instruction, and network directors of ExEd, maintains the structures and programming needed to ensure high-quality support for students with disabilities. Staff understand that the least restrictive setting is the most appropriate for each child. For a vast majority of LEAD Brick Church students, this setting is inclusion. Math and ELA courses are co-taught by a content expert and ExEd teacher. In these classes, ExEd teachers use data to plan and pull small groups when appropriate or work with the general education teacher to parallel teach or co-teach. Students with disabilities also receive targeted instruction based on their disabilities and needs identified in their Individual Education Plans (IEPs). For example, students with a reading deficit will spend time in a smaller intervention style class (in addition to their English course) that provides targeted support for their areas of deficit. This course is taught by an ExEd instructor and is consistently adjusted based on student progress monitoring data.

General education teachers are supported in understanding and implementing the tools and strategies needed for students with disabilities to be successful in an inclusion setting. For example, all teachers are trained in Google Read and Write to ensure students who need read-aloud can receive it on any assessment. Time is set aside in grade-level team meetings with ExEd team representatives to review student accommodations and ensure all teachers are informed and confident in implementing accommodations in their classrooms. Furthermore, teacher input is elicited prior to and during IEP meetings, and IEPs at-a-glance are reviewed with teachers prior to the school year to build shared ownership over student goals.

In addition to services in more inclusive settings, LEAD Brick Church provides special education services to support students with low incidence disabilities. These students receive vocational and life skills opportunities. Students with these needs also receive modified programming, lessons, and activities in order to engage in the same activities as their peers. Material is consistently taught at the student's level and in reference to their IEP goals to promote continual learning growth.

Furthermore, ExEd teachers and instructional managers commit to ongoing professional development to optimize instructional practices for student learning. For example, along with Network Academic Team members, members of the LEAD Brick Church's ExEd team attend the Council for Exceptional Children's annual conference to learn the most recent strategies for ExEd interventions. These strategies are brought back to teachers. In addition, all ExEd teachers and support staff are trained annually in Crisis Prevention and Intervention. ExEd instructional managers participate in bi-weekly network-wide meetings for professional learning and opportunities to collaborate on problems of practice. These meetings are facilitated by network ExEd directors. Additionally instructional managers and network ExEd directors meet regularly to focus on ExEd compliance and instruction needs specific to LEAD Brick Church.

To support failing students with disabilities, ExEd teachers and the ExEd instructional manager take a number of steps. First, the ExEd instructional manager works with the ExEd teacher to delineate between supporting students and helping students with executive functioning needs. Here are some actions that the ExEd instructional manager and teacher might then take:

- Reach out to general education teachers about students of concern and get additional context on student performance
- Provide updated IEP at-a-glance for teachers to have in hand when calling parents about failing grades
- Read aloud missing tests
- Communicate with parents about why the student is failing if it is not due to deficits (Ex. calling parents to let them know that the student has received three opportunities to complete test corrections, but is choosing not to do so for homework)
- Hold make-up tests/assignment lunch sessions
- Work with a student on homework or provide a reteach during arrival
- Help with backpack organization to support with loss of papers (homework or test corrections)
- Check in with students after progress reports to review grades and create goals

As an added measure, the director of exceptional education instruction provides each ExEd instructional manager with a list of students with IEPs who are in danger of failing grades based on progress reports. All instructors with ExEd students failing their course meet one-on-one with the ExEd instructional manager at the conclusion of the quarter. This meeting helps shape the change in supports needed for the next quarter or semester.

At the network level, students with disabilities are supported by the director of exceptional education instruction and the director of exceptional education compliance. At the school level, the instructional manager for ExEd supervises the exceptional education teachers and education assistants. Each year, the director of ExEd and director of human resources meet with the school principal and relevant school team members to analyze the needs of incoming students and develop a hiring plan. The hiring plan, at a minimum, meets the basic requirements of the special education program staffing plans. While staffing ratios are determined by the individual needs of the students each year, they typically include at least one ExEd certified teacher per grade, 2 ExEd paraprofessionals and an ExEd instructional manager. In addition, we staff a life skills program with an ExEd certified teacher and support staff.

### **Meeting the Needs of Gifted Students**

LEAD Brick Church prioritizes the appropriate identification of students with exceptionalities including those who are gifted. Students who have not been diagnosed as gifted before middle school may be identified through teacher

and/or parent referral. Once referred for testing, a certified educational evaluator will determine eligibility based on the gifted matrix which covers achievement, creativity, and cognition.

With the identification of gifted, students will be educated based on an Individualized Education Plan (IEP) created by the student's IEP team. Gifted students may receive their services in a variety of formats, based on the individual student's needs. These options include, but are not limited to, academic acceleration through curriculum compacting, enrichment projects within the general education setting, and independent study. Student achievement will be monitored via IEP goals to ensure educational services are appropriately impacting a student's educational experience and success.

### **Say Dyslexia**

The Tennessee "Say Dyslexia" law requires school districts to screen all students for characteristics of dyslexia through their existing Response to Instruction and Intervention (RTI<sup>2</sup>) procedures. School teams will use screening assessment data and information to determine a student's need for dyslexia-specific intervention. This law, which is similar to many recently passed across the country, emphasizes the need to explicitly use the term "dyslexia" when working with students at risk for reading failure and demonstrating characteristics of dyslexia. While schools have been implementing Response to Instruction and Intervention (RTI<sup>2</sup>) and identifying students with reading needs historically, they had not been using the term dyslexia until now.

LEAD Public Schools Say Dyslexia Guidance reviews in detail the practices and procedures for implementing the Say Dyslexia law. Students whose assessment data places them in an ExEd Intervention or SRA Levels A or B1 (Tier III) meet the criteria for Say Dyslexia and will be documented as such. For each student identified with characteristics of dyslexia, an Individualized Learning Plan - Dyslexia (ILP-D) is developed. This plan provides appropriate tiered dyslexia specific intervention designed to provide access to instruction aligned to grade level academic standards and to assistive technology supports. ILP-Ds are reviewed annually and progress to parents reported quarterly. The RTII instructional manager serves as the ILP-D coordinator.

### **EL Students and State Board Rule 0520-01-29**

LEAD Brick Church receives transfer students and newcomer students, who are students recently immigrating to the United States. When students register, if they have never before enrolled in a US school, we ask them to complete a Home Language Survey. If anything other than English is marked in any of the survey questions, we screen students using the WIDA Online Screener. If students have been enrolled in a WIDA state school before, we secure previous ACCESS scores and the original Home Language survey. The scores from either WIDA ACCESS or the WIDA Online Screener determine the EL Services students receive. Students below a 2.5 enter into our sheltered English Language Development class. The majority of these students have immigrated to the country in the last year. Students who score between a 2.5 and a 3.5 are put into mainstream classes and are provided English Learner services through co-teaching in the English Language Arts classroom. Some students demonstrate higher proficiency - above a 3.5 in reading, writing and one other domain, and qualify for individualized services and have fewer minutes of consistent English as Second Language (ESL) Services. LEAD Brick Church provides staff the opportunity to get an endorsement in English as Second Language by paying for the programs and costs of PRAXIS exams. We also when crafting our master schedules each year ensure that we do have the required 1:35 teacher to Limited English Proficient (LEP) student ratio.

At LEAD Brick Church, we utilize the TN PULSE platform to house our Individual Learning Plans (ILPs). ILPs are created for students within the first 30 days of school, and updated every nine weeks (quarterly)

after. Our ILPs have student demographic information, language goals, and growth trajectories based on their WIDA ACCESS scores and monitored through their Formative Language Assessments (FLAs). ILPs also have testing and classroom accommodations, and their dedicated ESL services all of which can be adjusted throughout the school year as students' language proficiency fluctuates in order to ultimately result in best growth outcomes possible. LEAD has an internal Diverse Learner Dashboard which has teachers' rosters of students, filterable by class period, to view accommodations for English Learners, Students with 504 Plans and Exceptional Education students. This tool is helpful for teachers to plan for testing and instructional accommodations.

TN PULSE is the platform that houses our ability to monitor and evaluate the progress and success of EL programs. TN PULSE also has monitoring forms that LEAD Brick Church uses to monitor transitional students who demonstrate low performance in their core content classes after exiting the EL program. These monitoring forms provide digital records of academic performance, and also include teacher recommendations about additional supports that may be needed. Additionally LEAD Brick Church utilizes the data platform, ELLevation, to analyze students' assessment scores, demographic data, and to create data visualizations. Monitoring of all Transitional Year 1 and Year 2 students is completed through the TN PULSE Platform, in accordance with State Rule 0520-01-19-.06. Input from teachers is collected through grade-level team meetings, potential supports may be recommended and added, and a digital record is completed within TN PULSE. Monitoring of transitional students is completed quarterly, once every nine weeks.

### **English Language Learners**

The mission of the LEAD EL Department is to provide an equitable education with research-based strategies for multilingual students by developing and supporting all professionals who work with and educate multilingual students in order to prepare them for college and life. LEAD Brick Church's English Language Learner programming is in line with the Tennessee English Learner Framework and English Second Language Manual. The model and supports utilized at LEAD Brick Church differ by student ACCESS score. Here is an overview of the specific models utilized at LEAD Brick Church by ACCESS score, followed by in-depth rationale for this choice:

- All students are served in their heterogeneous English Language Arts classes. Our model is to have all ELA teachers EL Certified. Currently, an ESL co-teacher also pushes into the ELA classroom.
- Newcomer students (below a 2.5 on WIDA ACCESS) receive an additional weekly hour with a certified ESL teacher to work on developing oral and social language. As students progress in their language development, this additional time will also be used to provide more comprehensible input and access for their ELA reading assignments.
- Score 2.5-3.5: Scheduled into cohorts with EL supports in the English classes. These students receive instruction in general education courses in which English is the primary language and receive language supports from an EL Certified co-teacher.
- Score 3.5-4.5- If students meet the requirements specified in State Rule 0520-01-19, some students qualify for "individualized services" and may only receive language supports as needed.
- Students that are dually-identified (EL and ExEd) have supports outlined in their IEP and ILPs. We map services prior to the school years beginning to ensure that all diverse learners will have access to the entire menu of services we have offer at LEAD Brick Church.

This service model allows for students in grades 5-8 to receive the services that are most in line with their level of language acquisition. The model is staffed by EL certified teachers and overseen by an instructional manager at the

middle school. In addition to the outlined service delivery model, all staff work to support students with finding success in their class. Some regular actions include the following:

- Instructional managers provide feedback on lessons with a particular eye toward accessibility without diminishing rigor.
- Instructional managers observe classrooms often and provide coaching on instruction, including EL strategies.
- Instructional managers and network EL staff provide professional development and support geared toward the needs of school staff.

At the network level, English learners are supported by the director of EL and the network EL coordinator. At the school level, EL teachers are supervised by an instructional manager. EL instructional managers participate monthly in network-wide professional learning through bi-weekly meetings facilitated by the network director of EL. In addition, the director of EL meets regularly with EL instructional managers regarding best practices in instruction. The EL coordinator meets regularly with EL instructional managers to ensure strong compliance practices.

Each year, the director of EL and director of human resources meet with the school principal and relevant school team members to analyze the needs of incoming students and develop a hiring plan. The hiring plan, at a minimum, meets the basic requirements of the EL program staffing plans in compliance with the 1:35 ratio. While staffing ratios are determined by the individual needs and numbers of the students each year, they typically include two EL teachers. LEAD has a relationship with Lipscomb University to offer financial support to teachers seeking to become EL certified through college-level courses and appropriate exams in order to increase teacher knowledge and positive impact of instruction on diverse learners.

### **Dually Identified Students**

LEAD Public Schools has developed policy for students who are identified to receive both exceptional education services AND English learner services. The policy is directly influenced by and ensures compliance to both Exceptional Education and English as a Second Language laws and policies at the local, state, and federal level.

Initial Collaboration - Within the first 30 days of school (or within fourteen days of a mid-year transfer), exception education and EL Leaders collaborate to identify dually identified students and appropriate services and accommodations.

IEP Meetings - During the annual IEP meeting for dually identified students, an EL teacher, coordinator, or director must be present at the IEP meeting, serving as the specialist in second language acquisition and to inform families of how the EL program will support and implement the child's IEP. EL representatives may not be required at addendum IEP meetings, however, special attention is paid to district and school transfer meetings to ensure WIDA ACCESS Accommodations are accurately documented. If the dually identified student has a low incidence disability which significantly impacts their language acquisition, each year at the annual IEP Meeting, the team determines whether or not EL services will be beneficial. When the IEP team determines that EL services are beneficial, the exceptional education and EL teams collaborate on determining the best EL services for the students to participate in.

## **1.9 School Culture and Discipline**

*In this section:*

- (a) Provide as Attachment A the school's Student Handbook and indicate any changes that will be made if authorized by the Charter Commission.
- (b) Describe the school's culture and how it promotes a positive academic environment for students. Including examples of positive behavior intervention system, student artifacts, or student surveys.
- (c) Describe any challenges the school has had with its culture while authorized by the ASD and any adjustments it made to the culture to improve the academic environment for students.
- (d) How does the school intend to integrate new students into the school culture once it becomes an open-enrollment charter school?
- (e) Provide the student discipline policy as Attachment B (if not already included in Attachment A of the school handbook) and indicate any changes that will be made if authorized by the Charter Commission.

While we do not anticipate making any substantial changes to the Student Handbook if authorized by the Charter Commission, we plan to make some minor adjustments to ensure full compliance with TPCSC policy. In addition, we will need to modify the handbook to refer to the Charter Commission instead of MNPS as an authorizer, as well as reference the MNPS discipline tables as our guide.



At LEAD Brick Church, we value culture as the foundation that supports all other aspects of our school. A positive school environment that prepares students for life and meets their daily needs is crucial to success within the classroom. We are committed to improving our practices each year to build our students up and grow them in ways that will result in the highest quality education, accessible by all. This is accomplished by having clear and consistent high expectations, earning rewards and acknowledgment for meeting those expectations, and holding students accountable when they choose not to meet our expectations. The ultimate goal of LEAD Brick Church is to strengthen our cultural roots and

invest students in learning. By creating a safe and joyous school environment, we embolden our staff and students to be LEADers in our team and family.

In order to achieve our culture goals and to promote a positive academic environment, LEAD Brick Church employs the following programs and strategies:

### **Positive Behavior Interventions and Supports (PBIS)**

LEAD Brick Church has built its cultural systems on Positive Behavior Interventions and Supports (PBIS), a framework that impacts how a school operates as a community and systematically improves student behavior. We use evidence-based practices to implement a tiered model of behavior support that facilitates student outcomes and academic success. PBIS is for the whole school, it is preventative, and it changes the paradigm of focus from negative behaviors and exchanges to positive expectations and interactions.

### **School-Wide Behavior System**

We value consistency in our school because it is the foundation of providing a safe and predictable environment for our students and staff. Providing our students with positive and negative consequences requires a strong commitment to consistency. Commitment to consistency and academic success is how students will know we care about their well being.

### **Building Relationships**

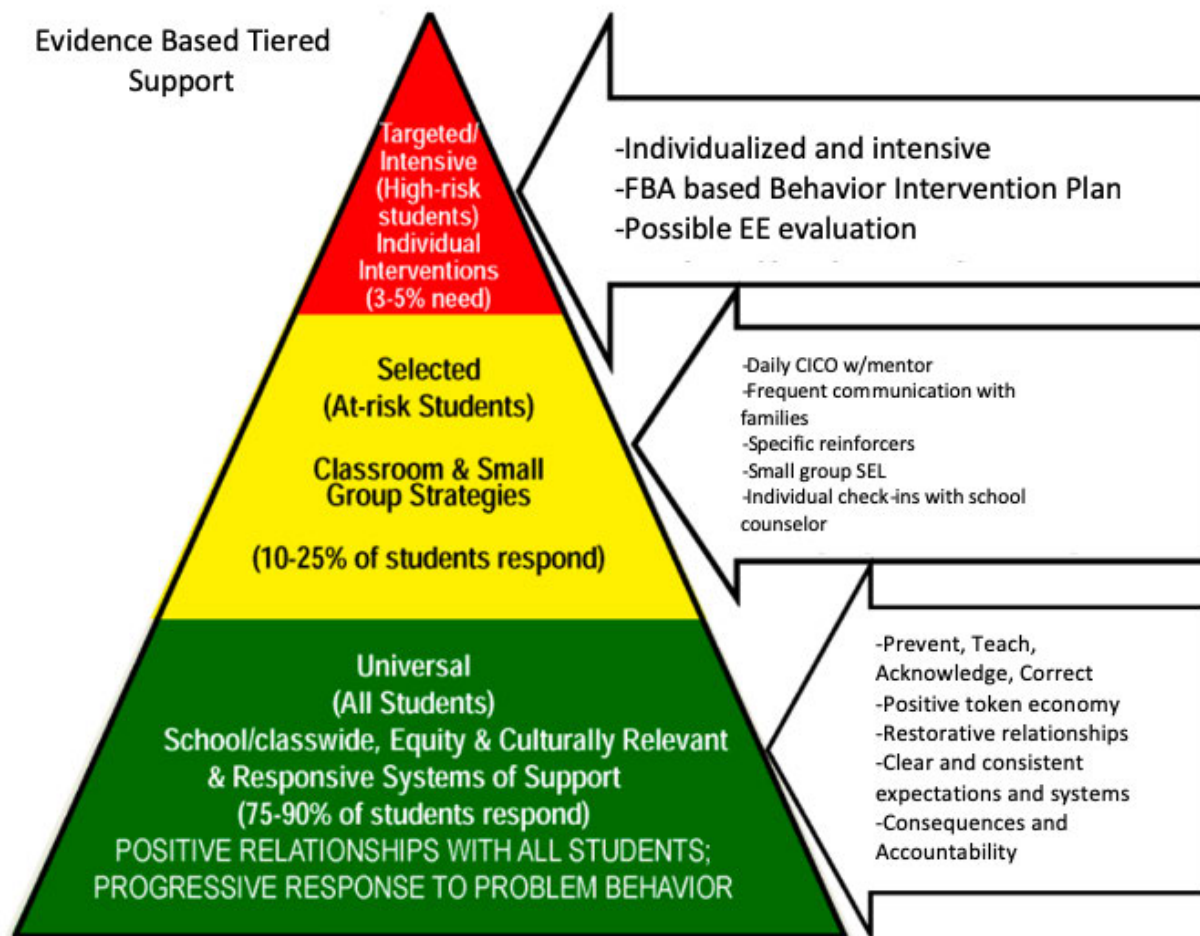
At LEAD Brick Church, we seek to understand our students and view them through multiple lenses. We do this through inclusiveness to all and embracing each student and their families. We believe that building strong and healthy relationships with our students and their families is key to a healthy school culture. We use trauma-informed practices while also holding our students to high expectations. Consequences are meant to teach and guide our students to make better choices, so we approach each consequence through the lens of restoration. We celebrate success and learn from our mistakes, always pushing ourselves, our students, and each other to be our authentic and best version of ourselves.

### **Family Engagement**

For students to learn, they must be present, in class, and engaged in the work every single day. Some of our biggest barriers of student learning have been high out of school suspension rates and low attendance rates, especially among our special populations. Another barrier that we face within our student culture is including the families of our students. We want to do more than simply include families. See Section 1.11 for further details on how we engage our families.

### **Trauma-Informed Care**

At LEAD Brick Church we believe that our purpose is to create a safe environment where ALL students can grow, learn, and develop. Trauma-informed care is understanding that our students are more likely to have experienced trauma in their lives than not. It is looking through a lens of, "What happened to this student and how is it impacting behavior?" as opposed to, "What is wrong with this student?"



### Tier I Process of Universal Support

An effective school-wide PBIS begins in the classroom and generalizes to the whole school. While school administration and support staff track fidelity, implement PBIS protocol throughout the school, and support teachers in maintaining efficient learning environments, it is the classroom faculty's responsibility to build a classroom management plan that follows the PBIS guidelines and promotes a positive rapport with their students. This requires teachers to develop practices that include, "...preventative and responsive approaches that may be effectively implemented with all students in a classroom and intensified to support small groups or a few individual students."<sup>5</sup> Students must have a predictable and positive environment in order to learn in every classroom and faculty must be unified in providing this.

In addition to the school-wide data collection protocol, a Classroom PBIS Plan should include strategies and practices that promote and acknowledge valued behavior and prevent and correct problem behavior.

### Tier II PBIS/RTI2B Process - Supplemental Support

Tier II interventions are used to support a targeted group of students who are not responding to the universal

<sup>5</sup> <https://www.pbis.org/topics/classroom-pbis>



system or need small group instruction to begin progress. A Tier II intervention is supported by data collection, a menu of interventions, frequent monitoring, and data-driven decision making. This supplemental support is intended to be provided to 10% of students. Tier II students will be identified based on DeansList data. Additional strategies and parent contact need to have been completed prior to referral to Tier II. Teams will meet in grade level teams every three weeks to discuss student behavior and progress. Teams may meet more often if there are student behaviors that require more immediate attention. Once accepted into the program, counselors and a team will meet with student and parent. It is important that all stakeholders collect and document data following procedures. Counselors will be reviewing the data to determine student progress and following up with mentors and teachers to address barriers. Students will not be provided additional interventions if the documentation is not there.

### **Tier 3 PBIS Process - Individual Support**

Tier III interventions are intensive and specifically tailored to the needs of the individual students. This supplemental support is intended for 5% of the student population. Tier III students will be identified after being in Tier II for 8-10 weeks with little to no positive change in behavior. Students who have not shown improvement after 8-10 weeks of Tier II support with fidelity will have an S-Team meeting to decide next steps. It is important that all stakeholders collect and document data following procedures. Counselors will be reviewing the data to determine student progress and following up with mentors and teachers to address barriers. Students will not be provided additional interventions if the documentation is not there. Interventions include a Functional Behavior Assessment and Behavior Intervention Plan or Possible referral for a comprehensive evaluation for exceptional education services.

### **Student Surveys**

Student feedback is a critical tool in assessing progress and informing changes to our school culture. The LEAD Student Survey is administered two times per year and is used by school leadership, grade-level teams, and network leadership to track our progress towards student culture goals. This two part survey consists of both a student needs assessment and a 21 question (20 Likert and 1 Open Ended) survey focused on school culture. The needs assessment portion is viewed only by school counselors and used to respond to needs of specific students such as food insecurity and home safety concerns, as well as to identify trending counseling needs that could be addressed in small group counseling, individual counseling, or classroom guidance. The student survey data is compared between schools, across timeframes and within specific student demographics, all in a dynamic report shared with the full school and network teams. In the Fall 2022 administration of the school survey, the primary takeaway was the strong relationships students have built with other adults, specifically, the proportion of students who reported having an adult in the school they could trust, and the number that reported that their teachers believed in them.

While Brick Church has developed a strong student culture, we recognize that there are opportunities to improve school culture, primarily around student and family buy-in for building a culture of learning. In order to create a space where all students and families feel comfortable, safe, and welcome we made a number of enhancements to our student culture approach. First, we instituted a commitment process for all new families. As part of this process, we sit with each family and discuss the expectations we have for the LEAD Brick Church staff, the students at the school, and the families. Once in the building, we have a clear PBIS system and token economy that all revolve around academic achievement and our Ethos (see culture section). We celebrate students and actions that reflect our Ethos and cultural and academic priorities. Lastly, we chose to over communicate with our families around their students' performance in our

school. We utilize a program called DeansList along with our academic platform, Canvas, to provide parents and students with in depth insight into their lives at school. All of this adds up to a holistic system that has resulted in excellent growth scores and improved success rates.

LEAD Brick Church will take the same approach to integrating students into the culture that it currently does (see section c above). We anticipate that additional enrollment from neighboring schools will closely mirror the demographics we currently serve. From a student culture perspective, we already operate as if our school is open enrollment in that our job is not just to provide a place for students to attend school but to create an environment within which students are comfortable, respected, and loved; and just as importantly, understand that school is about academic success and our shared Ethos. Integrating new students into the school culture begins during the very first touchpoint from our family and community engagement (FACE) team who coordinates the enrollment process with our school culture teams.

In order to facilitate a strong culture across our network of schools and to set consistent expectations for families who choose to enroll their students in multiple schools across the district, we have chosen to follow the MNPS Discipline Tables across our network. Additional student behavior expectations are found in our school handbook. We do not anticipate making any changes if authorized by the Charter Commission.

### 1.10 Recruitment and Enrollment

*NOTE: Any charter school authorized by the Charter Commission is an open-enrollment charter school where any eligible student within the geographic district in which the school is located may attend. Any charter school moving from the ASD would lose any defined attendance zone and would be open to any student within the geographic district.*

*In this section:*

- (a) Provide as [Attachment C](#) the school's Enrollment Policy, which should include the following:
  - i. Tentative dates for the application period and enrollment deadlines and procedures, including an explanation of how the school intends to receive and process application forms and run a lottery, if necessary (considering the authorizer's open enrollment and lottery schedule);
  - ii. Nondiscriminatory admission policies, pursuant to T.C.A. § 49-13-107;
  - iii. Any proposed articulation plans or agreements, pursuant to T.C.A. § 49-13-113;
  - iv. Identification of any pre-admission activities for students or parents; and
  - v. Policies and procedures for student waitlists, withdrawals, re-enrollment, and transfers.
- (b) Describe how parents and other members of the community will be informed about the shift from the ASD to the Charter Commission as it pertains to enrollment procedures.
- (c) Describe your student recruitment plan along with your plan to ensure strong enrollment over time.
- (d) Does the school anticipate any student attrition if authorized by the Charter Commission, and how will the school backfill those students?

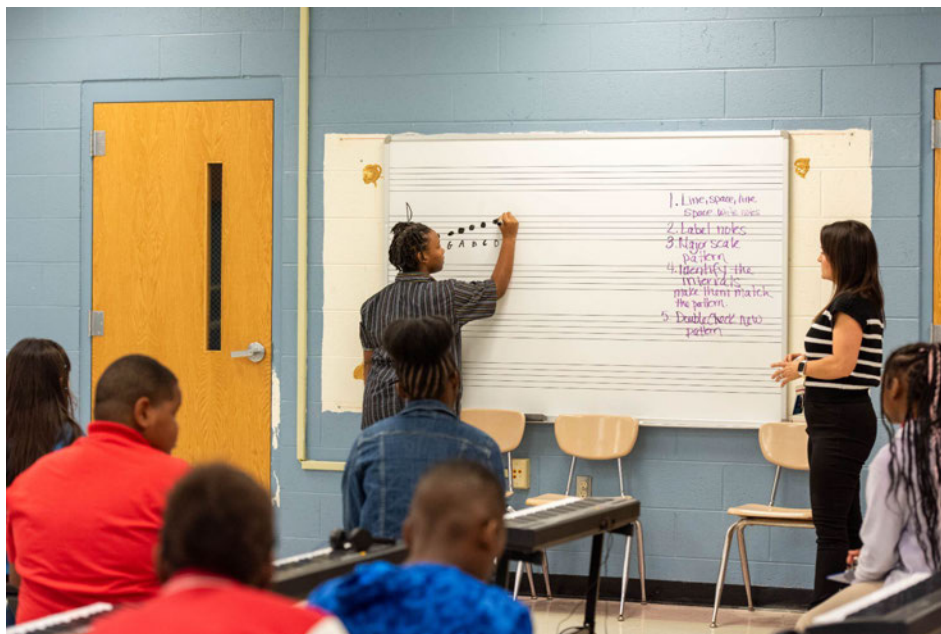
LEAD Brick Church already implements a range of communication tools and practices to ensure that families and key community partners are informed about school updates. We plan to use those existing channels to communicate to our families about the shift to the Charter Commission, with a particular emphasis on how the authorization may impact them. For example, families are already curious as to any change in paperwork needed to

re-enroll their current student or future siblings given the change in authorization. Examples of these communication opportunities include the Family LEADership Team, monthly coffee event with the principal, monthly newsletter, and a series of parent informational sessions. During these initiatives, we will discuss with attendees what our exiting the priority list means and detail exactly what our joining the Charter Commission means for their family.

In addition to the letter already sent home to families (see below), beginning in December, we will host our re-enrollment process, during which we speak to families about their intentions for the 2023-24 academic school year. During these conversations, we will engage families via our closed Facebook group, Possip, which is our parent surveying tool, DeansList, which is our text messaging platform, and through direct phone call outreach to detail enrollment for the 23-24 school year.

### Student Retention

Our overall enrollment strategy first and foremost begins with retaining our existing students. Historically, our re-enrollment process has had a response rate greater than 95% at LEAD Brick Church. We will leverage this process to continue to successfully engage our LEAD Brick Church families with the goal of successfully retaining greater than 85% of families. Over the past 5 years, we have been able to consistently retain between 77% and 85% of families that were eligible to return to LEAD Brick Church. Many of the families we serve move out of the district, state, or even the country, throughout the year. This geographic mobility consists of the vast majority of our student attrition each year.



An additional layer to these efforts is our hiring a manager of family engagement and customer experience which is a role that is grounded in ensuring that we build a robust family experience that ensures that families have reasons to opt in to continuing their enrollment at LEAD Public Schools. This role will work collaboratively with our school-based family and community engagement coordinators to ensure that their families' feedback is heard and incorporated to ensure a family experience that is rich and grounded in being responsive to the needs of our families. We have KPI's around response rate (family survey in Possip), sentiment score (family survey in Possip), successful engagement (80% or better of our families being engaged in our school's culture), and 50% of our faculty and staff engaging in out of school activities to connect with our families around their experience with our schools.

### 2022-23 Student Attrition (update with current numbers)

Reason	# of students
Moved out of district or state	9

Transportation	7
Concerned with academic expectations	0
Concerned with discipline practices	0
Expelled	0
Withdrawn due to breach of behavior agreement (but not expelled)	0
Unknown	0
Other (please specify)	23 - Change of Address 1 - Drop out investigation 0 - Non-Public School Transfer 0 - Online School
Total # of Students Withdrawn	40
Student Attrition Rate (%)	36%

### Student Recruitment

LEAD Public Schools has a proven track record of reaching out to the Nashville community and recruiting a diverse student body at all other LEAD campuses. As a network of both zoned enrollment and open enrollment charter schools, we have successfully managed enrollment systems for families accustomed to a zoned enrolled school and also having to opt-in to a school of choice. With this experience, we will leverage learned best practices as we enter this new phase of LEAD Brick Church with the Charter Commission.

As a neighborhood zoned school, we have exclusively recruited from the LEAD Brick Church geographic zone set by Metro Nashville Public Schools and have offered transportation solely within those boundaries. As we have communicated previously, we intend to expand the recruitment boundaries and the related transportation boundaries. Our initial outreach activities include canvassing a target neighborhood, conducting a neighborhood needs assessment, working with the Neighborhood Resource Center and Family Resource Center to conduct research, attending neighborhood meetings with neighborhood nonprofits and community-based organizations, and holding informational sessions for prospective parents and families. We will also leverage our current community partners in partnering with their initiatives to get exposure to their students for the purpose of both engaging with families, but also spreading the word about LEAD Brick Church.

LEAD Brick Church will continue to employ a dedicated full time FACE (family and community engagement) member, as well as rely on our network FACE support team, which includes three full time staff members that have recruitment, family engagement, and customer experience as a primary responsibility. The FACE team has deep connections in our communities and speak a range of languages including Spanish and Arabic. With these expanded recruitment boundaries, we are staffed to be able to additionally canvas, recruit, and host community

events to increase awareness about LEAD Brick Church. We feel confident that the school, its mission, and expectations will not only be accepted by the community but also actively supported.

LEAD is open to any student and parent in Davidson County who meets the eligibility requirements as defined under Tennessee Code Annotated § 49-13-113 and who chooses to attend. Recruitment efforts will be aimed primarily at the communities near the school location, but there will be no geographical boundaries or restrictions on applications. LEAD will comply with all State and Federal regulations regarding nondiscrimination and will not discriminate against any student, parent, employee, or community member on the basis of race, ethnicity, national origin, religion, gender, or disability. LEAD will strictly maintain a nonsectarian approach to all its programs, events, admissions policies, employment practices, and all other operations. LEAD will never charge tuition. LEAD will recruit all students regardless of their socio economic, academic or special need status.

LEAD Public Schools anticipates student retention consistent with its historical numbers, about 77-85% over the past 5 years. An adjustment that we have already made in anticipation of the reauthorization is to adjust our re-registration process to occur earlier. This will ensure we have an understanding of how many of our currently enrolled families intend on re-enrolling for the 2024-25 academic year. This re-registration period will open the first week of December and run for two weeks. Once this period commences, we will then have a sense for what we need to successfully recruit through our lottery process.

In order to successfully backfill, we are hosting a referral campaign with our currently enrolled students, continuing our partnership with Alex Green Elementary, and additionally recruiting in our secondary enrollment zones via our community engagement strategy. Alex Green is our sole MNPS feeder, and though we will continue to enroll students from there, our increased efforts in our secondary zones will complement anticipated decreased enrollment from Alex Green. We will additionally engage in order to generate additional leads that we will then engage via our Open Houses, informational sessions, and community events in partnership with community organizations.

### *1.11 Parent and Community Engagement and Support*

*In this section:*

- (a) Describe the ways in which the school has made current families aware of the potential transition from the ASD to the Commission. Describe any changes to the parent and community engagement strategy if authorized by the Charter Commission.*
- (b) Describe the operator's parent and community engagement under the ASD, and how the operator will communicate the change in authorizer if approved by the Charter Commission.*
- (c) Provide, as Attachment D, any of the following for the application: letters of support, memoranda of understanding, or contracts that indicate the school is welcomed by the community, the community supports the operator continuing to serve the school community, is viewed as an attractive educational alternative, and/or reflects the community's needs and interests.*

In preparation for this application, the LEAD Brick Church principal, family and community engagement coordinator, and network support staff initiated a communications plan that included using multiple platforms (DeansList, Facebook, and physical letters being mailed) to inform families of our application to the Tennessee Public Charter

School Commission. Direct messaging via text message and DeansList were also made as targeted efforts to ensure that families were both informed and able to participate in our LEAD Brick Church Parent Petition Process.

In addition, every family received a letter outlining the potential change of authorizer. As of the application date, 81% of families have responded, 97% of which affirming their desire for LEAD Brick Church to remain being operated by LEAD Public Schools under authorization of the Tennessee Public Charter School Commission. Forms were completed both in hard copy and electronically to ensure that families were able to engage in a manner that was best suited to their needs. These documents were presented in English and Spanish. For families that needed other languages, we targeted those families as a part of our targeted efforts.

Feedback throughout this process yielded consistent commentary that families are passionate about being able to continue their enrollment at LEAD Brick Church, so our communications are grounded in reassuring families that they can continue having their families experience be provided by LEAD. LEAD Brick Church has been able to impact families intergenerationally, which is why our sibling outreach is so vital to our recruitment efforts. We will continue to host sessions and provide information both written and electronically to support families being informed and knowledgeable about how they can continue to enroll in LEAD Brick Church.

Feedback from families and community partners was also incorporated into this application and into our plans moving forward. Most notably, current families wanted us to continue to offer 5th grade, despite the fact that MNPS has moved 5th grade into elementary grades in neighboring schools. When we sought an extension with the Achievement School District, greater than 87% of families voice support of our continued operation. Parents also had specific suggestions on how to successfully recruit students in the broader Whites Creek community, including specific places to build relationships and to ensure representation at community events. They also emphasized that while they appreciate the focus on literacy and excellent teaching, they recommended emphasizing the student reward system and the strong school communication as notable areas of difference from other schools to use in our communication with prospective families. Family services were also mentioned as something that would be a value add so that they could better engage in the learning environment that LEAD is creating as a part of the LEAD experience. Our LEAD Serve Others Stations, LEAD Market, LEAD Care Portal, and LEAD Ethos Exemplified Holiday Outreach initiatives are all initiatives providing essential supports to families. These services include household toiletries, cleaning supplies, food, clothing, rental assistance, and other essential services so that families feel supported by LEAD.

Moving forward, the executive leadership team, along with the campus leadership team, has created a communications plan aligned to the Charter Commission's timeline for engaging families in our progress in the authorization process. That plan includes attending upcoming Family LEADership Team meetings, leveraging the campus newsletter, weekly principal message to families, and Possip to inform families about the application process and continuing to receive feedback from current LEAD Brick Church families.

We do not anticipate making any major changes to our overall parent engagement strategy, as we currently have the mindset of actively enrolling and engaging our zoned enrolled students. However, as we expand our geographic zone, we will need to modify our current action steps to include a larger geographic range of stakeholders. All of our community partners serve the greater Whites Creek community, not just the LEAD Brick Church zone, so the shift to a broader geographic zone will also have minimal impact on our community engagement strategy.

For LEAD Brick Church to be a successful school and to have a strong student culture, we must meaningfully engage the families of our students. These efforts include intentional programming that not only includes diversity initiatives, but more importantly, reacting to what initiatives families are responding to. We continue to broaden what we include in “successful family engagement” so that we can meet families where they are in their ability to engage with our LEAD Brick Church community. For example, we have noticed that a significant portion of our enrollment are not able to come into our school doors due to work and essential home commitments, but are able to provide feedback on their experience with LEAD Brick Church through their participation in our bi-weekly family surveying in Possip. We have been intentional in identifying 10 ways for families to successfully engage with our campus community: Family LEADership Team participation, parent volunteering, Possip survey, attendance at on or off campus events, supporting their scholars on campus ( i.e. Birthday Celebrations, Parent Meetings, Parent Teacher Communication), parent teacher conferences, and providing resources to benefit students and families.

LEAD Brick Church is excited to share that during the 2022-2023 school year we successfully engaged 84% (roughly 193 students) of our families through our family engagement efforts led by our family and community engagement coordinator. Our family engagement efforts are aimed to successfully engage the majority of our enrollment. Complementing our family engagement coordinators efforts, our network engagement team provides translation support where we can translate documents, attend on-campus parent meetings, host home visits, and provide other support to enhance our family engagement efforts. These initiatives ensure that the campus is intentionally building authentic relationships with our families that encourage engagement with our school community.

We are working at LEAD to identify barriers to student success and provide real-time interventions to help alleviate them. A variety of factors can make it difficult for a child to attend school daily. A major barrier to attendance for families with children attending LEAD Brick Church was identified as a lack of access to basic needs—such as laundry detergent and hygiene products. Because of this, we feel that the LEAD CarePortal and the LEAD Serve Others Stations will provide a value add to our families that will not only alleviate pressures that our LEAD families experience at home, but will also support our goal of improving attendance at school daily. Since its inception in 2020, the LEAD Serve Others Stations has been able to serve more than 310 families which includes more than 365 LEAD students. As of November 2023, we have served 48 families, and are on track to serve 2-4 families weekly. The LEAD Care Portal, which we instituted in January 2022, has served 13 families, 33 students with the support of our LEAD Community of partners and volunteers. Support has included rental assistance, support with homelessness, and assistance with furniture and household items. Implementation of these services aligns with our belief: meeting students’ and families’ needs academically, physically, and emotionally ensures success.

Another one of our more successful engagement initiatives is our Student-Led Conferences (SLCs) which LEAD Brick Church conducts annually. During these sessions, students communicate their successes and challenges and are able to review their academic progress with family members. Another pivotal tool that has enhanced family engagement in the past three years is the implementation of our closed Facebook Group which has enabled us to not only update families on school operations, but also provide a closed space for families to engage as a school community.

What has made these initiatives sustainable is family and community engagement being a core component of our school culture and the expectation for all school staff to be involved. We have an active Family LEADership Team, and also current community partnerships with the Caron Treatment Centers, Animax Designs Inc., Tennesseans for Student Success, Meharry Medical College, Well Child, Bridge Ministry, and the Second Harvest Food Bank to provide services and resources for our students and families. Throughout the school year, our campus leadership



team consistently received feedback from families through Possip, which provides bi-weekly surveys to parents gauging parent satisfaction with LEAD Brick Church. Not only did we average around 27 responses through Possip, we also maintained a customer satisfaction score of 2.8 out of a 3.0 matrix scale throughout the entirety of the school year.

## SECTION 2: OPERATIONS PLAN AND CAPACITY

### 2.1 Governance

*In this section:*

- (a) *Describe the current composition and size of the governing board and board committees. Explain how the governance structure and composition ensures the school is an educational and operational success.*
- (b) *Describe what staff reports to the governing board and how those individual(s) are evaluated.*
- (c) *Describe plans to recruit additional board members with identified skills and how the governing board has handled board member attrition.*
- (d) *Describe how the governing board receives training in compliance with Tenn. Code Ann. § 49-13-111(o) which requires annual board training, as certified by the Tennessee Charter School Center and approved by the State Board of Education.*
- (e) *Describe the circumstances under which complaints are brought to the board and the process for addressing them.*
- (f) *Please include the following governance documents as Attachment F:*
  - i. F1. Articles of Incorporation*
  - ii. F2. Proof of non-profit and tax-exempt status*
  - iii. F3. By-laws*
  - iv. F4. Code of Conduct*
  - v. F5. Conflict of Interest Policy*
  - vi. F6. Board policies (including frequency of meetings, open meetings and open records*

The current LEAD board is composed of 14 individuals, including a family representative, all of whom are committed to work with LEAD management to ensure student and school success. These board members represent the major constituencies needed to support effective and efficient CMO operations, including academics, finance, fundraising, marketing, information technology, human resources, and facilities management, among other areas. The Board has legal representation and utilizes it as necessary.

The LEAD Board consist of several active committees, including:

- **Executive Committee:** This committee is composed of the Board Chair, chairs of all other committees and the CEO. It is responsible for advising the CEO and Board on major strategic decisions, responding to urgent situations, setting the agenda for board meetings, guidance and oversight of other committees, and board-related budget items
- **Governance Committee:** This committee is responsible for nominating additional board members, leading the CEO annual evaluation, reviewing the compensation of the CEO and the CEO's direct reports, and performing an annual self-evaluation of the board's effectiveness.
- **Finance Committee:** This committee reviews and makes recommendations to the Board concerning all policies relating to the financial operation of the organization (and its subsidiaries), including the current operational budget, annual audit, and other financial endeavors. It works with the chief financial officer in developing the budget and reviewing annual and long-term financial performance.

- Development: This committee works with the VP of development to oversee fundraising campaigns, both general and special, as the Board deems necessary for the continued operation, growth, and development of the organization.
- Academic: This committee works with the chief academic officer to review academic performance and to make reports and recommendations to the Board to sustain and improve academic outcomes.

It is the board's responsibility to ensure that the total organization is effective in achieving its mission and efficient in using its resources. The Board of Directors regularly requests and receives reports on academic, financial, operational, compliance, and strategic results that are documented in approved minutes to meetings and posted publicly on LEAD's website. The Board establishes academic, financial, and enrollment goals each year and tracks against this progress regularly. The LEAD Board of Directors reviews all audits, 990 tax returns, nominates and elects new board members, conducts official business on behalf of the organization, evaluates organizational performance.

A conflict of interest policy is in place and annual conflict affidavits are signed by each board member. The Board holds all meetings in accordance with the state's Open Meetings law and records minutes for all meetings on the LEAD website.

The Board hires and completes annual evaluations of the CEO who is responsible for overall management of the LEAD organization and the results of all schools in the LEAD organization. The Board of Directors approves the expectations, compensation and performance of the CEO on an annual basis, taking into account national benchmarking of similar roles. The Board ensures that long term executive leadership is in place and that effective succession planning is occurring. The CEO then hires, manages and evaluates all the members of the executive leadership team. The Board reviews compensation of both the CEO and executive level leadership each year.

The Governance Committee is responsible for attracting, evaluating, and nominating potential board members and ensuring adequate parent representation amongst the board. LEAD Board policy allows for up to 20 board members, compared to our current 14. We plan to slowly increase the size of our board by three or four additional members to continue to build out committees and to allow for attrition due to term limits. Even once the final size of the board is achieved, the Board will continue to recruit new members to ensure effective succession planning, over the next charter term. Our board members view new board recruitment as an ongoing responsibility and play an active role in attracting new members to our organization. Board members nearing the end of their board tenure often bring one to two prospective new candidates for evaluation. We also source board members from members of the public and LEAD Community who have shown an interest and support for our work. This focus on continuous member development ensures a long term sustainability for our board. Board members have clear expectations and orientation for their roles and participate in various committees to further support the school.

The Board completes annual training as required by law and via Tennessee code as prescribed in this section. Training has previously been coordinated by the TN Charter School Center, but our practice is currently changing to be in alignment with the new law passing responsibility of approving trainings to the State Board of Education. Completion of training is monitored and tracked by leadership staff.

The student handbooks have complaint procedures documented and the Board is available to ensure due process is given to any and all complaints. The process is five steps and is outlined as follows:

1. **Direct Conversation.** If a parent has a misunderstanding or disagreement with an instructor, the parent should address the concern to the specific instructor directly involved with the circumstances surrounding that concern. The staff member will meet with the parent as soon as possible, but in no case longer than five (5) school days after the instructor has been notified of the concern;
2. **Fact and Possible Resolution.** If a parent or instructor is not satisfied with the outcome of Step 1, a meeting will be arranged in an appropriate timeframe, but in no case more than five (5) school days after the meeting in Step 1. No further action is taken unless the parent submits a written request seeking an additional remedy;
3. **Formal Process.** If a parent's concern has not been satisfactorily resolved in either the first or second step, the parent should refer the matter to the School principal in writing. A meeting will occur within 10 school days; the principal or a designee will provide written dispositions to each party within five (5) school days;
4. **Ad Hoc Board Committee.** If either party is still dissatisfied with the outcome of Step 3, an Ad Hoc Committee is convened to provide the final review.

### Current Leadership

List all current governing members and their roles on the table below (adding rows as needed).

Full Name	Current Job and Employer	Focus/Expertise	Role on Governing Board
Mike Honious	President & CEO, GEODIS	Executive Leadership; Development; Operations; Public Relations	Board Chair
Dr. Annette Little	Professor, Lipscomb University	Education; Curriculum	Academic Committee Chair
Rob Keller	VP, Client Services, Asurion (Retired)	Marketing; Customer Relations; Organizational Experience	Development Committee Chair
Dr. Earl Lattimore	Instructor/Program Coordinator, MeHarry Medical College	Parent/Community Involvement; Education	Director; Parent/Family Representative
Carter Paine	CEO, Wayspring	Finance; Operations; Public Relations; Management/Organizational Experience	Director; Former Board Chair
Dwayne Tucker	CEO, LEAD Public Schools	Community Service; Executive Leadership; Public Relations; Fundraising; Legal expertise; Human Capital; Marketing	Director; LEAD CEO
Jonathan Dyke	CEO, FutureSelf Network	Marketing; DEI; Entrepreneurship	Director
Dr. Bryan Fisher	Vascular Surgeon; The Surgical Clinic	Medical	Director
Valerie Hayes	Managing Director, Deloitte	Finance; IT; Management/Organizational Experience; Community Service/Outreach	Director
Jerome Oglesby	Global Chief Technology Officer, Deloitte	Operations; IT; Executive Management; Community Service	Director

Linda Pannock	Managing Director, Ankura (Retired)	Strategic Planning; Change Management	Director
Alex Ryerson	Partner; Luxor Capital	Finance; Fundraising	Director
Jim Vesterman	Founder, Raptor Technologies (Retired)	Operations; School security	Director
Don Williamson	Managing Director, Compass Executives (Retired)	Executive Leadership; Finance, Former CEO & CFO; Personnel/Human Capital	Director

## 2.2 Facilities

*NOTE: There are two facility options an operator needs to prepare for:*

- i. If the operator has time remaining on the original charter agreement with the ASD, the charter school has the right to continue to use the LEA's school building for the duration of the initial ten-year agreement under the current facility plan (e.g. no rent/lease payments). Upon renewal of the ten-year agreement with the Charter Commission, the charter school shall enter into a lease with the home LEA for at least three years, purchase the facility, or relocate to a new facility.*
- ii. If the operator's original ten-year agreement with the ASD is expiring and the operator is applying for a new ten-year agreement with the Charter Commission, the charter school shall enter into a lease with the home LEA for at least three years, purchase the facility, or relocate to a new facility.*

*In this section:*

- (a) Describe the school's facility plans that align with T.C.A. § 49-1-614 based on the pathways outlined above in (i) and (ii).*
- (b) If planning to rent or purchase the current facility, describe the operator's plans for capital repairs and improvements on the facility.*
- (c) Describe the school's facility contingency plans should the school need to vacate its current facility.*

LEAD Public Schools currently has a lease with MNPS for the LEAD Brick Church facility. Per state law, we intend to continue to lease the building for a minimum of three more years, through the 2026-27 school LEAD will also seek to purchase the current Brick facility based on a fair market offer to MNPS. Based on the protections in state law, as well as anticipated timeline for alternative facilities development, we plan to engage MNPS in long-term negotiations concurrently with our facilities development process, beginning in the Winter of 2024.

LEAD is already well positioned to maintain and operate its current, leased facility. LEAD Public Schools is already responsible for maintaining and improving the facility, which is currently in excellent condition. All schools in the LEAD network, including LEAD Brick Church, operate at a small surplus that funds these types of capital repairs and improvements. Supplemental funding for these types of improvements also comes from the Tennessee Charter School Facilities grant. LEAD Public Schools has leadership experience in both facility acquisition and facilities management and currently leases several buildings from MNPS.

While operating in the current facility remains in the best interest of our students and our school, should the school need to vacate its current facility, the LEAD Board is committed to purchasing an alternate school location. To prepare for a facilities plan, LEAD has already engaged with a third party facilities acquisition company with over 70 years of combined experience helping charters secure and build facilities. We also have engaged with an experienced broker who has a robust process of locating sites both on and off market. This broker has completed over \$1.3 billion in real estate transactions over the past decade. LEAD has an established relationship with multiple architecture firms and contractors who we would seek to engage in a bid for services should they be needed.

In working with these facilities experts, we have worked through a project plan, associated timeline, financial model, and recommended list of financiers should we need to purchase a new facility. We have done the due diligence to consider both a new build or a creative reuse of an existing facility and have outlined the square footage, acreage, and codes requirements of a suitable site. Any new facility would be chosen based on geography, with an attempt to locate the school in the area most convenient for the most number of families, as well as ensuring a new site meets the programmatic and legal requirements. LEAD Brick Church resides in a comparatively underdeveloped community. The area immediately surrounding Brick Church has a number of commercial sites that are underdeveloped and we anticipate similar sites, with acreage to accommodate athletic spaces and parking, to be available during the timeframe appropriate for future facilities development work. Based on our planning with external facilities experts, benchmarking of other school development projects, and our own experience converting commercial space into a 5-12 campus, we anticipate facilities development to require 24-30 months of lead time and would likely take the form of a purchase and renovation of a local commercial space.

In addition to understanding the acquisition requirements, LEAD has a strong balance sheet, positive cash reserve, and established relationships with potential lenders to assist with securing any necessary financing, including both its current bank who provided financing for past projects, as well as competing financial institutions and a number of nonprofit facilities financing companies. See the Budget Narrative in the appendix for financial assumptions related to future lease rates and contingency costs.

Finally, LEAD has a successful track record of identifying, purchasing, and renovating a school. An example of this experience is at LEAD Southeast's current location at 531 Metroplex Drive. LEAD identified this space in 2012 and engaged brokers to buy the space. Once the office park was purchased, LEAD engaged in a renovation of the space and, in fewer than six months, renovated two out of the three office buildings into a school, including a fully functioning kitchen with a cafeteria large enough to support a full 5-12 school. The second and third phase of renovation work added grades 5-8 and then 9-12 in the building with the construction of a fourth building as a PE space. The full project was paid off in full with no remaining debt in 2021.

While it is too premature to know with certainty whether MNPS will choose to sell the building to us or reissue our lease in 2027, in the event we need to identify and develop our own space for LEAD Brick Church, we have the plan, experience, and financial resources to do so.

## 2.3 Personnel/Human Capital

*In this section:*

- (a) *Describe the school's current leadership structure. Include a copy of the school's organizational chart as Attachment F. The organizational chart should clearly delineate the roles and reporting structure of the board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that play a role in managing the school.*
- (b) *Describe the teacher evaluation model that the school utilizes that is in alignment with State Board Policy 5.201.*
- (c) *Describe the plan to ensure a fully licensed teaching staff if authorized by the Charter Commission.*
- (d) *Discuss the school's teacher attrition rates, any staffing challenges the school has faced while authorized by the ASD, and the steps the school took to overcome those challenges.*
- (e) *Discuss the school's teacher recruitment strategy to attract and retain high quality, fully licensed teachers and staff.*
- (f) *Describe any leadership changes that have occurred while authorized by the ASD and the steps taken to ensure a smooth transition between school leaders.*
- (g) *Include a copy of the school's employee manual and personnel policies as Attachment G.*
- (h) *Complete the staffing chart below, outlining your staffing projections for the first year the school is authorized by the Charter Commission. Adjust/add functions and titles as needed to reflect variations in school models.*

The LEAD Public Schools Board of Directors is ultimately responsible for the success of the organization—academically, operationally, legally, financially. The Board approves the mission, key strategies, budget and financial performance of the entire organization upon the recommendation of the chief executive officer and executive team. The Board hires, evaluates and holds accountable the LEAD chief executive officer. The LEAD executive team consists of experienced education professionals, including the chief academic officer, head of middle schools, head of high schools, chief financial officer, chief operating officer, chief human resources officer, chief strategy officer, vice president of development, director of enrollment and family engagement, and director of communications. LEAD Brick Church is headed by a school principal, who is supported and evaluated by the head of schools.

The school principal is the person responsible for the success of the school. This individual is supported by a School Leadership Team (SLT) composed of the school principal, assistant principal of instruction, assistant principal of students, and director of school operations. All LEAD Brick Church staff ultimately report up to members of the SLT. In addition, LEAD Brick Church has a Parent Leadership Council who provides advisory input to the School Leadership Team on a regular basis.

LEAD Public Schools uses the Tennessee Educator Acceleration Model (TEAM) to evaluate all licensed teaching staff. This model engages principals and teachers through “frequent observations, constructive feedback, student data, and professional development”<sup>6</sup>. TEAM Certified school leaders observe teachers at multiple points during the year and score them using the TEAM rubric. Scores are then submitted to the state via TNCompass.

Compliance with Teacher Licensure is the responsibility of the CHRO and the talent recruitment manager.

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<sup>6</sup> <https://team-tn.org/>

LEAD seeks to recruit and retain teachers who have already secured their Tennessee license, but actively supports teachers in transferring licenses from out of state. Our application process includes space for educators to disclose their licensure status. Licensure data is tracked and monitored in TNCompass and loaded into our HRIS system to ensure accuracy. LEAD also provides training support and financial assistance for certification programs and Praxis exams to gain initial certification or add endorsements. LEAD also uses state issued Academic Permits and Academic Waivers to bridge the gap between initial hire and program completion for some individuals. As



English learner certification is one of the most difficult certifications to find the necessary staffing for, LEAD has cultivated a partnership with Lipscomb to pay for English learner endorsements, as needed, for those who are seeking to teach English learners and commit to continue working at LEAD.

In the transition to the Charter Commission, our goal is to “meet expectations” on the performance framework by increasing our teacher retention rate to 75-85%. To achieve this goal, we have implemented a multi-tiered approach to teacher retention. LEAD administers an Employee Engagement Survey in the fall and the TNTP Insight Survey once in the spring to gain insight into future anticipated turnover. We pair that information with exit interviews to understand the primary factors driving teacher attrition. Although LEAD strives to retain all of its teachers, natural attrition has taken place with some of the most common reasons for leaving being teachers moving out of the area or leaving the teaching profession altogether.

In order to improve our teacher retention rates, we continue to focus on the levers that are most associated with these reasons for leaving: compensation and managers. We have made significant investments in increasing the compensation of all LEAD teachers in order to make the profession more competitive with private sector jobs. Our Master Teachers can now earn up to \$100K in base salary by staying in the classroom and our rewards program allows returning teachers to earn up to a 10% increase per year based on their performance. In addition, we have shifted our instructional coach role into an instructional manager role so teachers have a direct manager who is also responsible for their development. This year, each instructional manager has received significant training on not just instructional coaching, but also leadership and management. Instructional managers each have a personal Executive Coach provided to them to accelerate their management effectiveness. We believe that their effectiveness will be key to our teachers envisioning the classroom as a long-term career option for them. This work is encapsulated in a recent quote from our Fall 2023 staff survey: “LEAD provides all the things a teacher needs to be the best version of themselves and continue to improve. Having a manager and multiple people that I can reach out to for help has been so amazing to have. I have never had those things at another school.”

Brick Church has experienced many of the same challenges that other schools in the state and across the country have faced in regards to teacher shortages, specifically in math and exceptional education. We are



working to overcome these challenges through partnerships with organizations such as Relay and Nashville Teacher Residency. LEAD currently has a \$600K grant through Score focused on creating a new teacher pathway program to increase the number of certified teachers.

Our approach to sustainable organization results begins with a shared purpose. We believe in holding all of our students to high academic standards- and in creating a **joyful, safe environment** where students can accomplish their goals and be proud of their work. We place a high priority on **intentional relationship building** so every student feels connected and known at school. We believe a **growth mindset** is key to developing world-class students who develop the habits and grit to succeed. We have a commitment to **daily excellence** and strive for the best for our students and community.

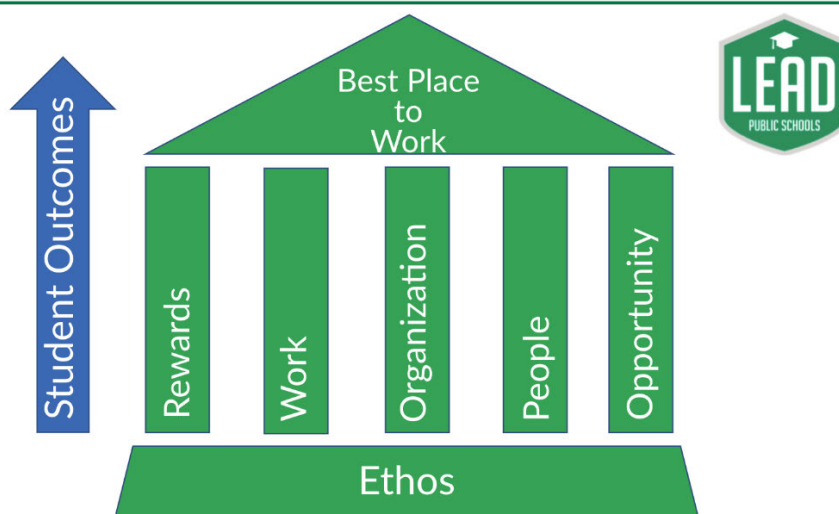
To achieve the above, we have built an integrated talent management system to assure that we have the right people in the right roles at the right time. This is key to achieving student outcomes at scale and over the long-term. Our integrated approach to talent management was built on evidenced based approaches (McKinsey, Gallup, Center for Creative Leadership, and Towers Watson) and includes four key areas:

1. **Talent attraction and selection** - Sourcing, selecting, and onboarding the right people for the right roles at the right time.
2. **Managing performance and developing talent** - Engaging each member of the team, focusing on performance, quality conversations, and coaching to build skills and capabilities.
3. **Employee value proposition** - Compensation strategy as part of a complete employee value proposition unique to the organization including rewards, work, organization, people, and opportunity.
4. **Building organizational capacity and capability** - Organization structure, role definition with linked and clear accountabilities, effective teams, and solid human resource administration.

While all are important to sustainable organizational results, talent development and effective leadership and coaching are the most critical to achieving our teacher staffing needs over the next ten years.

To further LEAD's long term staffing strategy, LEAD's Employee Value Proposition was launched in 2018. Designed to create a culture which would attract and retain high-quality teachers and staff and ultimately position LEAD as a "Best Place to Work". The Employee Value Proposition is based on five pillars:

## LEAD Public Schools Employee Value Proposition



**Rewards.** We provide transparent performance-based compensation that allows excellent teachers to rapidly advance their base pay. Teachers can earn up to 10% base salary increases annually based on their performance. We offer market competitive benefits with 16 weeks paid parental leave for primary caretaker and flexible paid time off. We modified our reward structure to compensate our teachers, not by how many years they have worked, but by their positive impacts on students and schools, evidenced by their consistent performance in and out of the classroom.

**Work.** Our work is mission-focused and vision-aligned to ensure every student is ready for college, ready for life. We provide coaching, support, and autonomy. We take initiative and are solutions-oriented. We empower teachers to have a voice in the direction that they want their career to go.

**Organization.** We are the largest homegrown charter school network in Nashville with a reputation for excellence. Our six schools serve all students through a rigorous academic experience, through both open-enrolled and zone-enrolled schools. We live our Ethos; we are committed, courageous, disciplined, self-reliant, and serve others.

**People.** We build trusting relationships and communicate with caring directness. We celebrate successes and recognize individual and team results. We have a growth mindset and provide opportunity for ongoing learning and individualized development. We listen actively and seek to understand. We are accountable.

**Opportunity.** We invest in professional development and have a coaching culture of continuous improvement. Teachers and support staff have the opportunity to choose a career path aligned to their goals. We offer a Master Teacher program that rewards our highest performing teachers and allows them to stay in the classroom as a long-term career option. We have restructured our staffing models within our schools to include more instructional leaders. At LEAD Public Schools, we have built a model wherein there is one instructional leader for every 6-8 teachers. This allows our coaches to prioritize the development of our teachers through regular, on-going feedback.

In addition to retaining teachers, LEAD Public School's Talent Acquisition team members work year-round to develop potential hiring pipelines, referrals, and relationships with key stakeholders in order to develop potential applicants and hires for the upcoming school year. We ensure that our talent team is staffed in a way that maximizes the candidate experience and minimizes time to hire.

The annual hiring process resets each year in November and a recruitment strategy is developed based on data from the previous recruitment and hiring season in order to better identify and target trends. LEAD Public Schools actively recruits and targets teachers who align with our Ethos and who demonstrate commitment to the LEAD mission. We connect with these candidates through referrals from current staff, external job postings, job fairs, and other sources such as LinkedIn, Indeed, and partner search firms. In addition to targeting experienced teachers, LEAD Public Schools attends all Tennessee School of Education job fairs and additional fairs in Alabama, Mississippi, and Kentucky and other nearby states. We also partner with local organizations such as Teach for America, Nashville Teacher Residency, and Relay Graduate School of Education to enhance teacher pipelines.

Partnerships with Teach for America, Nashville Teacher Residency, high-performing charter schools and CMO's around the country, and relationships with local and state universities continue to provide a valuable pipeline for the most qualified, dedicated, and passionate applicants to apply for positions at LEAD Public Schools.

Hiring and maintaining a consistently high-quality instructional staff is critical to the LEAD school model. Since LEAD Public Schools will hire instructors from a wide variety of backgrounds, ranging from experienced instructors to recent college graduates with no teaching experience, it's important that we create an interview and hiring process that is aligned to our Ethos, and aligned across our network. Candidate resumes are thoroughly screened to meet our network needs and candidates who meet those benchmarks are screened and interviewed using our aligned interview tools and methods. LEAD Public Schools also utilizes multiple people in the interview process in order to build capabilities in our current staff while ensuring they are invested in the success of new teacher hires.

Finally, we understand the challenges that exist with the current teacher shortage and therefore know we have to implement innovative strategies to enhance our pipeline in non-traditional ways. In order to do this, we have two specific partnerships.

The State Collaborative on Reforming Education (SCORE) is supporting LEAD in the launch of our Teacher Pathways Program. This program aims to provide alternate pathways to teacher certification through a variety of external partnerships that give interested and identified candidates an option that best fits their situation. External partners through this grant include Nashville Teacher Residency, Iteach, Lipscomb University, Grand Canyon University, and Relay Graduate School of Education. In year one of the sub-grant from SCORE, LEAD Public Schools launched our Teacher Pathways Program, which resulted in an increase in the number of individuals enrolled in alternative certification programs supported by LEAD from two in the 2021-22 school year to seven in the 2022-23 school year, and 12 in the current school year. This program will continue to allow us to broaden our teacher candidate pool in what we believe will continue to be a tight labor market going forward.

LEAD Public Schools also recently received a \$12,000,000 grant award from the US Department of Education's Teacher and School Leader grant program. The purpose of this grant is to increase educator effectiveness by investing in processes that will strengthen teacher evaluation, increase development of teachers and leaders, and provide incentives for high-performing teachers. This grant will allow LEAD to enhance our performance-based compensation program by offering competitive signing and retention bonuses in addition to student performance bonuses for teaching and support staff. This will ultimately help us enhance our Employee Value Proposition by strengthening our human capital strategy around recruiting, hiring, developing, and retaining high-quality talent both in the classroom and in positions of leadership.

All these efforts have generated success in recruiting and hiring outstanding, mission-driven teachers and instructional staff members who have been the basis for LEAD's sustained results.

LEAD Brick Church was founded in 2012 and experienced strong leadership stability with its founding principal serving from 2012 to 2015. From 2016 to 2021, LEAD Brick Church experienced principal turnover that did not meet the expectations of the organization. However, during this time there was consistent leadership from the Head of School who served as the interim principal until a new principal was hired. This allowed for continuity of organizational knowledge and systems knowledge as we transitioned between leaders.

Beginning in 2021, significant investments in both staff and leadership at LEAD Brick Church resulted in consistent and sustained leadership to the present day. LEAD Brick Church's current principal has been at the school since the beginning of the 2021 school year. Drawing on her extensive experience in turnaround schools, she has been able to form strong relationships with students, families, and staff which have, in turn, created a sense of stability at the school. Specifically, a number of key leaders and teachers have remained at the school because of the consistent principal leadership. This has resulted in an upward trajectory of student retention and student results.

LEAD understands success, especially in priority school turnaround, requires experienced executive and school leadership. In 2018 LEAD began a comprehensive talent strategy to evaluate and develop leaders and calibrate leadership talent across our network on an ongoing basis. In order to support growth and sustainability of academic results, we complete talent calibration and succession planning twice a year for all network and school leadership from the instructional manager level all the way to the CEO. See Attachment S for more detailed information regarding our comprehensive approach to leadership development.

LEAD's talent calibration and succession planning process engages school principals and network executives in a review of performance, progress towards goals, and development towards LEAD's Leadership Competencies. The goal is to evaluate role readiness and identify necessary development areas for leaders across the network. Through this process, leaders are identified as successors and are assigned leadership development appropriate with their level of performance and potential. CEO succession planning occurs twice per year and involves the CEO and the LEAD Public Schools Board of Directors. This process also includes identification of a current interim successor, identified as LaVoe Mulgrew, in the event there is an emergency or if LEAD's current CEO is unavailable.

Our unique leadership development and talent strategy includes customized 360 feedback and executive coaching for six months. This allows us to develop current leaders while building a pipeline of future leaders all grounded in our unique leadership Ethos. Our leadership development and talent strategy ensures a smooth leadership transition and allows for high potential staff to move throughout our network of schools. Since the inception of this program, LEAD has retained 75% of our leadership with 30% receiving promotions within our network. Most significantly, five of our six current principals were internally developed and promoted. We believe this process of identifying and developing leaders will significantly impact our success and sustainability in the long term.

<b>Year 1 Staff Assumptions</b>	
<b>Administrative Staff</b>	
Principal/School Leader	1.00
Assistant Principal	2.00
<b>Total Administrative FTE</b>	<b>3.00</b>
<b>Instructional Staff</b>	
Teachers	12.00
Special Education Teachers	3.00
Paraprofessional	2.00
Instructional Managers	2.00
Interventionist	6.00
Long Term Substitute	1.00
ELL Instructional Manager	1.00
<b>Total Instructional FTE</b>	<b>27.00</b>
<b>Non-Instructional Staff</b>	
Office Manager	1.00
Operations	1.00
Counselor	1.00
Student Support Coordinator	2.00
Family Engagement	1.00
<b>Total Non-Instructional FTE</b>	<b>6.00</b>
<b>Total FTE</b>	<b>36.00</b>

## 2.4 Insurance

*In this section:*

(a) *Provide a copy of the school's current insurance coverage as Attachment H.*

LEAD Public Schools currently maintains insurance coverage through HUB International in accordance with charter requirements for amounts and types of coverage. This policy covers all LEAD entities. See Attachment I for current levels of coverage. LEAD requires proof of adequate insurance coverage from all contractors, as deemed applicable by our financial policies.

## 2.5 Transportation

*NOTE: Unlike the ASD, the Charter Commission does not have the statutory authority to compel local school districts to provide transportation services. Each charter operator may attempt to contract with a local school district or other vendors to provide these services, if needed, but the charter operator bears all responsibility to establish any such agreements.*

*In this section:*

- (a) *Describe the school's transportation plans if authorized by the Charter Commission. Provide documentation of any such agreements or related documentation.*
- (b) *What contingency plans does the school have if contracted services are no longer available if authorized by Commission?*
- (c) *How does the school provide daily oversight of transportation and who serves as the transportation supervisor?*

LEAD offers transportation to its students by contracting services through a third party provider, Grayline. LEAD Public Schools has established reasonable transportation boundaries for each of its schools, taking into account the MNPS designated enrollment zone (if applicable), addresses of currently enrolled families, LEAD feeder patterns, and the time needed for buses to travel to individual campuses given traffic conditions. Transportation boundary maps are posted on the school website.

For students living within the transportation boundary, all students will receive transportation. School bus transportation will not be provided outside of the school's transportation boundary. Should additional space on buses exist, students living outside the transportation boundary may choose to ride the nearest bus, but they will be responsible for transporting themselves to the closest bus stop. If a student moves addresses from within the transportation boundary to outside the transportation boundary, the student will no longer receive transportation services, regardless of when the move occurs.

Students requiring special transportation will have transportation provided as outlined in their IEP. Based on current student needs, one special transportation bus with a monitor is routed for the school, but we have added the assumption of a second required bus if necessary in our financial forecast as we expand our transportation boundaries.

All routes comply with state mandated route times (TCA 49-6-2105). Budgetary assumptions include contracts with providers on a per route per day basis. We are anticipating increasing the number of routes from five general education and one special education today to six general education and two special education (as needed) in the future, as we expand the transportation boundaries of the school. The increased cost associated with this increase in routes is included in our financial assumptions. Our executed contract with Grayline is available upon request.

Our external agreement is not impacted by our authorizer, so we do not need to develop contingency plans for transportation services.

All transportation services are overseen by LEAD's chief operating officer, network director of operations, and each director of school operation with safety as our priority along with compliance to all state and federal guidelines. LEAD complies with all state and federal regulations regarding its transportation service. Our third party vendor keeps on file current copies of all driver licenses and a list of expirations dates that apply to those driver's licenses. LEAD will also inspect all buses before the start of the school year for proper registration and state inspections. We will also ask the state for unannounced inspections throughout the year to ensure buses are maintained and safe for our students.

## 2.6 Food Service

*NOTE: Unlike the ASD, the Charter Commission does not have the statutory authority to compel local school districts to provide food services. Each charter operator may attempt to contract with*

*a local school district or other vendors to provide these services, if needed, but the charter operator bears all responsibility to establish any such agreements.*

*In this section:*

- (a) Describe the school's food service plans if authorized by the Charter Commission. Provide documentation of any such agreements or related documentation.*
- (b) What contingency plans does the school have if contracted services are no longer available if authorized by Commission?*
- (c) How does the school provide daily oversight of food services?*

LEAD adheres to all school nutrition guidelines articulated in the Tennessee School Nutrition Act, T.C.A. 49-6-2301—2307, as well as federal guidelines such as the National School Lunch Act and Child Nutrition Act and is committed to providing all students access to healthy and nutritious meals. LEAD currently contracts with Metro Nashville Public Schools for all student nutrition needs and plans to continue that partnership for as long as possible. MNPS continues to provide nutrition services to LEAD at our other Charter Commission authorized school, LEAD Neely's Bend, and we anticipate LEAD Brick Church will mirror this arrangement.

LEAD Public Schools has already established a relationship with the Healthy School Food Collaborative. If LEAD were no longer able to contract nutritional services through MNPS, we would partner with HFSC to run an RFP for food service providers and self fund our own food service program. We have a green lighting process in place and have considered this move multiple times over the past three years due to issues with MNPS food service. Many charter vendors in town use SLA food services and we would encourage them, and similar vendors, to respond to our RFP.

The school provides daily oversight of food services through its director of school operations (DOPs). The DOPs interfaces with the cafeteria manager and MNPS food service staff to ensure that students receive all appropriate food services. To respond to the risk of potentially needing to bring food service in house, we have increased our future budgetary assumption to allow for an additional operations staff person to be responsible for both network compliance and food service; this person would report to the director of network operations.

## *2.7 Additional Operations*

*In this section:*

*Describe the school's plan for supporting operational needs of the following:*

- (a) Transition Plan:*
  - i. Describe what you anticipate will be the challenges of transitioning to a non-ASD authorizer and how you expect to address these challenges.*
- (b) Student information management:*
  - i. All Charter Commission-authorized schools must adopt the Charter Commission's instance of PowerSchool. This may result in the need for the school to run parallel or additional student information systems, depending on how the school's systems are set up. Describe how the school will prepare its school and staff for the adoption of a new student information system.*
- (c) School health and nursing services:*
  - i. Describe the school's current plan for compliance with the Coordinated School Health Program, and what adjustments the school will make if authorized by the*

*Charter Commission.*

*(d) Compliance monitoring:*

- i. Describe how the school will manage compliance monitoring from the Charter Commission, including the monthly reporting calendar submissions, and the position responsible.*

LEAD Brick Church also stands to benefit from the learnings of the transition from LEAD Neely's Bend from the ASD to the TPCSC during the 2023-24 school year. Our experience with the transition at Neely's Bend has informed our proactive planning for a transition to the TPCSC for LEAD Brick Church. In this section, we will discuss challenges we have experienced with LEAD Neely's Bend and how we are adapting to meet these challenges for LEAD Brick Church.

The largest challenge we have experienced is maintaining our enrollment numbers. While our LEAD enrollment team operates three schools as schools of choice, and we have waitlists at all of these schools, the transition from a school of zone to a school of choice has posed unique challenges. Using Neely's Bend as a test case, the local LEA has shown a willingness to change enrollment and grade-level patterns to siphon enrollment from ASD to TPCSC transition schools. Second, due to changing demographics, there are fewer students attending elementary schools in the area of Neely's Bend, making the pool of students available to attend smaller. Third, there is competing pressure from additional charter schools in the area.

LEAD Brick Church is better positioned to weather this change as it is not over reliant on a single feeder in the same manner as LEAD Neely's Bend is. Also, there is less direct charter competition in the area and the elementary enrollment is more stable. Nonetheless, we expect some of the same challenges to present themselves as part of the Brick Church transition and we do anticipate shifts in enrollment. Learning from Neely's Bend, we have already begun recruitment efforts as early as possible. We are targeting a growing zone of enrollment, focused on underserved areas in North Nashville, and are planning to broaden our transportation routes. Another adjustment that we have made with these anticipated challenges is enhancing our network engagement team by adding two additional team members to support our recruitment efforts for LEAD Brick Church and broadening our community engagement efforts.

The second challenge that presented itself this year was fully understanding and completing the task of transitioning our special populations from one LEA to another. Brick, much like Neely's Bend, serves a large portion of students with IEPs. The transition lift is robust and we will need to effectively plan for the amount of time it takes to transition 60+ students. While this process was compounded this year by the TN Pulse rollout, we expect to take the following steps next year. We will utilize existing Brick Church staff and network staff to begin the transition process as early as possible, engage parents in the process early and often, and plan and track the transitional IEPs so as to complete them during the approved window.

Another ongoing concern we have is the potential to lose the lease to our current facility. This is mitigated by the multi-year runway we have to begin negotiations with MNPS to secure a permanent replacement if required and the strong financial position we are in should we need to pursue a private facility (see Facilities section above).



Finally, we expect the compliance workload to look similar to Brick as it has at Neely's Bend. While we will see a reduction of three authorizers to two, resulting in a net reduction in compliance management, we have already expanded our compliance team and improved our internal processes. We have also moved teacher certification to the forefront of our recruitment efforts and made it a metric for principal effectiveness at every school, emphasizing the importance of having 100% certified teachers.

Lesser challenges identified are the potential need to move to a private food service provider and the work associated with transitioning to the new instance of PowerSchool.

LEAD Public Schools successfully adopted the Charter Commission's instance of PowerSchool one year ago for another school. Our organization is currently reviewing how to continue to optimize that system and plans to use that as a template for adopting PowerSchool for LEAD Brick Church. LEAD is currently under a renewed contract with a third party technology firm that specializes in SIS adoption and can assist LEAD in migrating to PowerSchool and building the necessary data connectivity between our SIS and other critical data systems. This migration is being overseen by our director of data, who reports to the Chief Strategy Officer, and is also supported by our data engineer.

LEAD Public Schools follows all Coordinated School Health Program guidelines. LEAD partners with a registered school nurse to support each LEAD school in ensuring that all students receive high quality care. We utilize contract nursing services (RNs and LPNs) to support nursing needs at our schools. LEAD'S current model has one school nurse in our network who has a schedule to be present in our schools on a regular basis and consults with each of our school's office managers. From time to time, we supplement this nursing capacity and, if required by student needs, will invest in additional nursing services. They are the main points of contact for any first aid or medication requests. Each school office manager is managed by a director of school operations, who reports directly to LEAD's chief operating officer, thus ensuring that the office manager maintains all Coordinated School Health Program guidelines. LEAD also partners with providers like Well Child and TEAMSmile to ensure that all students have access to high-quality preventive health care. Each school has an office manager who attends annual training from Metro Nashville Public Schools for Unlicensed Personnel on how to administer medication and administer first aid. LEAD Public Schools compensates MNPS for accessing this training for all schools, including those not authorized by MNPS. Should this training no longer be accessible to us, we would contract with our third party nursing vendor to train our staff.

Our external agreement with our nursing vendor is not impacted by a change in authorization.

LEAD Public Schools already manages the complexity of managing compliance monitoring within three LEAs: TPCSC, MNPS, and the ASD. Moving LEAD Brick Church to the TPCSC and eliminating the need for compliance with a third authorizer (the ASD) will, in effect, simplify our reporting requirements.

LEAD Public Schools has recently invested in a full-time compliance manager whose sole responsibility is to monitor authorizer compliance, including the timely submission of reporting requirements. This person is overseen by the chief strategy officer, who is ultimately responsible for authorization compliance across our network. The compliance manager maintains an internal calendar and checklist of all required actions and

documentation for each authorizer. At the school level, the school principal and director of school operations ensure that compliance monitoring occurs within each school building. The compliance manager meets regularly with representatives from school leadership, HR, operations, academics, enrollment, and finance teams to ensure all teams are provided the resources and tools necessary to maintain authorizer compliance.

In addition, dedicated members of the academic team regularly monitor compliance with special populations requirements (see Special Populations section above) and the chief financial officer is responsible for ensuring the network is in compliance with all financial regulations and federal funds.

## 2.8 Historical Operational Information

- a) *Describe the school's operational strengths and challenges and why the school's operational performance warrants continued authorization under the Commission.*
- b) *Since the network/operator has existed, list any contracts with any of the operator's charter schools that have been terminated by the network, the school's authorizer, or the school, including the reason(s) for such termination and whether the termination was for material breach.*
- c) *Since the network/operator has existed, list any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated by the network, and explain what caused these actions.*

Through the management of six schools, LEAD has clear practices, policies, and protocols in place, and the necessary staff, to execute on the daily operations of our schools. LEAD is managed by an experienced network team and has proven leaders in key roles such as CEO, head of schools, VP of HR, chief financial officer, chief academic officer, chief operations officer, and chief strategy officer. Over its 16 years of operations, LEAD has developed strong relationships with vendors and the local school district who provide reliable services to the organization, including facilities management, transportation, and food service.

While LEAD has established strong operational protocols, we also remain nimble in responding to challenges. An example of a recent challenge was our building cleanliness was not up to standards. This ultimately resulted in both changing our custodial vendor, negotiating a stronger contract with service level expectations, and utilizing a more sophisticated facilities cleanliness tracking application to ensure our standards were met. Another challenge has been the increased level of authorizer compliance reporting under the TPCSC at our first TPCSC school. LEAD quickly responded by hiring a full-time resource dedicated to compliance reporting and has implemented several tracking tools to ensure we remain on track.

Overall, LEAD Public Schools has a proven track record of meeting or exceeding operational and financial performance indicators set by its authorizers and we anticipate that trend to continue with our next TPCSC school.

We have not had any contracts that have been terminated by the network, the school's authorizer, or the school.

We have not had any charter revocations, non-renewals, or shortened or conditional renewals.

In 2015, LEAD sought and received amendment to our LEAD Academy charter to modify it from a 5-12 school to a 9-12 school. This was in response to the desire to use our facilities more efficiently and to move the middle school enrollment to a geographic area more closely aligned to students' homes. LEAD was able to absorb the middle school enrollment in other LEAD schools and enroll a greater number of high school students as a result. This school had a history of exemplary performance, multiple years of Level 5 TVAAS, had very low attrition, and was a Reward School in 2015.

In January 2023, LEAD Public Schools was awarded a contract by the Achievement School District to open additional turnaround schools in the 2024-25 school year. In September 2023, LEAD was notified by the Achievement School District of the district's intent to delay the openings of these schools by one year, to the 2025-26 school year, due to the delay in release of school accountability results.

## 2.9 Charter Management Organization (if applicable)

*In this section:*

*(e) If the school currently contracts with a charter management organization (CMO), please provide a copy of the current contract with the governing board as Attachment J. If it is not clear from the contract, please describe:*

- i. The scope of services and resources provided by the CMO;*
- ii. The division of roles and responsibilities between the board and the CMO, disclosure and explanation of any existing or potential conflicts of interest between the board and CMO, and how conflicts of interest are checked;*
- iii. How performance of the CMO is measured, including any deliverables;*
- iv. Conditions for renewal and termination of the agreement; and*
- v. Any monetary obligations of the CMO agreement.*

We do not plan to contract with a CMO.

## 2.10 Waivers

*Pursuant to T.C.A. § 49-13-111, a charter school may apply to either the authorizer or to the Commissioner of Education for a waiver of any State Board rule or statute that inhibits or hinders the proposed charter school's ability to meet its goals or comply with its mission statement. Approved waivers for schools authorized by the Commission are available on the [Commission's website](#).*

*Please list all waivers in the provided spreadsheet template below.*

TCA Citation	Description of Statute/Rule/Policy	Replacement Policy/Practice	How will waiver of this statute/rule/policy help student achievement?

TN EDUCATION STATUTE: 49-1-302(e)	Duty Free Lunch	We believe that it is important for teachers to have flexibility in how they use lunch time. While all LEAD teachers are encouraged to break for lunch, many choose to spend lunch time developing relationships with students and coworkers.	Allowing teachers flexibility in their day aligns to our goal of professionalizing the teaching profession and yields to better teacher retention and student outcomes.
TN EDUCATION STATUTE: 49-3-306(a)	Licensed Personnel Salaries	While we ensure that public monies will be used properly and all personnel will be paid adequately and timely, it is critical to our program that the LEAD payroll and compensation system reflects our individual school's purpose and philosophy. At LEAD we believe academic results should be a factor in determining total compensation.	While we ensure that public monies will be used properly and that all personnel will be paid adequately and timely, it is critical to our program that the LEAD compensation structure allows the school the flexibility to attract and retain the best talent possible.
TN EDUCATION STATUTE: 49-3-316	Local Fiscal Accounting	The LEAD Board approves the budget through an annual process.	While LEAD will ensure that public monies will be used properly, that all non-waived regulations will be met and that all operations will stand up to a financial audit, it is critical to the LEAD program that management systems reflect LEAD's purpose and philosophy.
TN EDUCATION STATUTE: 49-3-359(a)	Instructional Materials/ Supplies	In lieu of distributing funds to teachers to purchase their own instructional materials/supplies, LEAD acquires high-quality instructional materials/supplies for teachers and the school and distributes them prior to the first day of school. Teachers may also request additional materials and supplies unique to their classroom.	Acquiring high-quality instructional materials/supplies for all teachers and distributing them prior to the first day of school, as opposed to distributing funds to teachers for them to buy their own, will ensure that LEAD maintains high-quality instructional materials/supplies used in each classroom aligned to LEAD's academic model and purchases them in the most cost effective manner.
TN EDUCATION STATUTE: 49-5-101(a)	Licensed School Leaders	LEAD provides significant internal and external training resources for all school leaders and also prepares aspiring leaders through its resident school director program.	LEAD will recruit the most qualified school leaders from around the country to fulfill its mission.

TN EDUCATION STATUTE: 49-5-401	Teacher Assignment	The LEAD senior leadership team approves the annual calendar and school schedules.	LEAD will utilize an extended schedule, including increased instructional, as well as professional development hours. Teachers receive competitive compensation commensurate with increased work responsibilities.
TN EDUCATION STATUTE: 49-5-408-409	Evaluation Contracts and Termination of Contracts	The LEAD senior leadership team approves specific salaries and/or salary structures each year and total salary costs are approved by the board as part of the annual budget approval process.	A key to LEAD's success is being able to attract and retain a staff that is committed to our mission and to provide them with the motivation necessary to get the job done. It is essential that LEAD be able to design hiring, pay, benefits, promotion and evaluation systems that are aligned with our mission and goals.
TN EDUCATION STATUTE: 49-5-501-513	Tenure	The LEAD senior leadership team approves specific salaries and/or salary structures each year and total salary costs are approved by the board as part of the annual budget approval process.	As a charter school, LEAD must be performance driven. Therefore, all employees of LEAD will be "at-will."
TN EDUCATION STATUTE: 49-6-2206	Use of Unapproved Textbooks	The LEAD senior leadership team approves use of curricular materials.	The LEAD curriculum and instructional approaches will be linked to the school's mission and goals. LEAD will use both state-approved textbooks and other unapproved instructional materials.
STATE BOARD RULE: 0520-1-2-.02	Licensed Personnel Salaries	While we ensure that public monies will be used properly and all personnel will be paid adequately and timely, it is critical to our program that the LEAD payroll and compensation system reflects our individual school's purpose and philosophy. At LEAD we believe academic results should be a factor in determining total compensation.	While we ensure that public monies will be used properly and that all personnel will be paid adequately and timely, it is critical to our program that the LEAD compensation structure allows the school the flexibility to attract and retain the best talent possible.
STATE BOARD RULE: 0520-2-2	Career Ladder	The LEAD senior leadership team approves specific salaries and/or salary structures each year and total salary costs are approved by the board as part of the annual budget approval process.	LEAD develops its own career path structures in order to create the highest quality teaching and leadership force.

SBE rules 520-01-02-.07	Library Information Centers	LEAD schools provide students with access to classroom libraries, and on-site internet access at school.	This waiver is consistent with LEAD's mission and will aid student achievement by providing hard copy and internet resources to further student education. Library resources are available to students through the public library system, internet resources at school, and via classroom libraries.
SBE rules 520-01-02-.04-. 05	Leave for Teachers	LEAD hires its own teachers, as well as contracts with a third party provider of substitute teachers, some of whom are unlicensed and may continue to teach after 20 days of employment in certain rare circumstances.	A waiver of this statute will increase the pool of available substitute teachers, ensuring that all courses requiring a substitute are filled.
SBE rules 520-02-01	General Requirements for Evaluations	LEAD uses SBE rules for all teachers, but has an alternate, robust evaluation plan for administrators and non-instructional-licensed staff.	A key to LEAD's program is the autonomy necessary to attract and retain a staff that is committed to the LEAD mission and to provide them with the training and tools necessary to meet job expectations and pursue our mission. Accordingly, it is essential that LEAD be able to design hiring, pay, benefits, promotion and evaluation systems that are aligned with the school's mission and goals. The guidelines and performance expectations are outlined specifically in the annual performance goals as part of the LEAD performance management system.
TN Code 49-5-402	Salary Ratings	While we ensure that public monies will be used properly due to Board oversight and other controls, and all personnel will be paid adequately and timely, it is critical to our program that the LEAD payroll and compensation system reflects our individual school's purpose and philosophy.	At LEAD we believe performance results should be a factor in determining total compensation. It is critical to our program, staff recruitment and retention strategy that the LEAD compensation structure allows the school the flexibility to attract and retain the best talent possible.

## SECTION 3 FINANCIAL PLAN AND CAPACITY

### 3.1 Budgeting

*In this section: Public charter schools are required to operate under an annual budget on a July 1 – June 30 fiscal year. For purposes of this application, the charter school must submit the approved budget for SY2023-24 and projected budgets for SY2024-25 and SY2025-26 if authorized by the Charter Commission as Attachment J. While the budget may be in the school's own format, the following must be clearly delineated in the budget:*

- (a) All anticipated revenues (including TISA, philanthropy, and federal grants) and all anticipated expenditures.*
- (b) Explicitly detail major assumptions including but not limited to:*
  - i. Actual student enrollment in SY23-24 and projected enrollment for SY24-25, and SY25-26 and how these drive the budget assumptions*
  - ii. All anticipated funding sources, including TISA funding, philanthropy, federal grants, eRate, student fees, etc.*
  - iii. Staff compensation including benefits and pensions*
  - iv. Line items for each major expense and delineation of assumptions, including:*
    - Instructional materials and supplies*
    - School equipment and furniture*
    - Technology costs*
    - Professional development*
    - Student assessments*
    - Supplemental student information systems, if applicable. Note: All Charter Commission-authorized schools must adopt the Charter Commission's instance of PowerSchool which is paid for by the Commission.*
    - Special education services*
    - Student activities*
    - Transportation*
    - Authorizer fee (The Charter Commission can charge up to 3% of state and local funds)*
    - Contracted services at school (audit, I/T, etc.)*
    - Rent, utilities, and other facility expenses including capital repairs*
    - Office supplies and equipment*
    - Fundraising materials and resources (non-staff)*
    - Marketing costs*
    - Management fees and any other management compensation to the CMO or network (if applicable)*
    - Capital, contingency, and insurance reserve funds*

For this application, we have provided the current approved budget for the 2023-24 school year for Brick Church, as well as, the projected budgets for school years 2024-25 and 2025-26. See attachment.

## 3.2 Budget Narrative

*In this section: As Attachment K, present a budget narrative including detailed descriptions of budget assumptions, and revenue and expenditure projections. The narrative must include:*

- (a) Why the school's financial performance warrants continued authorization under the Commission;*
- (b) An explanation of student enrollment and TISA projections;*
- (c) An explanation of all funding sources, including grants, state, federal, and local per-pupil eligibility, other government resources, private fundraising, eRate, student fees, donations, etc.;*
- (d) An explanation of all anticipated expenditures including those identified in Section 3.1(b);*
- (e) An explanation of who is responsible for the school's financials (both school/network level and governing board level);*
- (f) The school's contingency plans to meet financial needs if anticipated revenues are not received or are lower than expected;*
- (g) How the school is accounting for increased costs that may be necessary if authorized by the Charter Commission (e.g. transportation, food service, services to special populations, etc).*
- (h) Provide the following in Attachment N:*
  - i. The last two years of audited financial statements for each school or school(s); and*
  - ii. The most recent internal financial statements, including balance sheets and income statements.*

See Attachment K.

See attached for the L: Budget Narrative.

### 3.2 Network Financial Plan (only applicable if the charter school is a part of a larger network)

*In this section:*

- (a) Describe the fiscal health of other schools in your network. Are any of the schools on fiscal probation or in bankruptcy?*
- (b) Provide, as Attachment L, a detailed budget for the network. You may reference the school-level budgets provided in Sections 3.1 and 3.2, as appropriate. Applicants must submit financial forms detailing:*
  - i. All major assumptions including but not limited to:*
    - *Student enrollment;*
    - *All anticipated funding sources (at the network level), including:*
      - *Local, state, and federal per-pupil funding; eligibility levels; and annual increases;*
      - *Other government resources;*
      - *Private fundraising;*
      - *eRate; and*
      - *Student fees;*



- *A back-office budget;*
- *Financial implications of facilities plans;*
- *Total employee compensation (network/CMO level), including the percentage of the total compensation allocated for the proposed school;*
- *Management fees and any other management compensation to the CMO or network (if applicable); and*
- *Capital, contingency, and insurance reserve funds.*

See attached for the L: Budget Narrative and K/M: Detailed Network Budget.

# ATTACHMENTS

- ATTACHMENT A: Student Handbook/School Forms
- ATTACHMENT B: Student Discipline Policy
- ATTACHMENT C: Enrollment Policy
- ATTACHMENT D: Letters of Support/MOUs/Contracts from the Community
- ATTACHMENT E: Governance Documents
  - E1. Articles of Incorporation
  - E2. Proof of non-profit and tax-exempt status
  - E3. By-laws
  - E4. Code of Conduct
  - E5. Conflict of Interest Policy
  - E7. Board policies
- ATTACHMENT F: School Organizational Chart
- ATTACHMENT G: Employee Manual/Personnel Policies
- ATTACHMENT H: Insurance Coverage
- ATTACHMENT I: CMO Agreement
- ATTACHMENT J: SY23-24 Approved Budget and SY24-25 Projected Budget
- ATTACHMENT K: Budget Narrative
- ATTACHMENT L: Network Financial Plan
- ATTACHMENT M: School Reports/Authorizer Evaluations
- ATTACHMENT N: Audited financial statements and most recent internal financial statements
- ATTACHMENT O: Litigation Documents
- ATTACHMENT P: Original approved charter application
- ATTACHMENT Q: Original approved charter agreement with the ASD
- ATTACHMENT R: Confirmation of Priority Exit Status
- ATTACHMENT S: LEAD Leadership Development Program



**Student and Family Handbook**  
*"Ready for College, Ready for Life"*

2835 Brick Church Pike  
Nashville, TN 37207

Phone: (615) 806-6317; Fax: (615) 505-3308

Website: <https://leadpublicschools.org/schools/brick-church/>

The content that follows is the LEAD Brick Church Appendix to the LEAD Public Schools (LPS) Student and Family Handbook. The information is in addition to what is stated in the LPS and the [Metro Nashville Public Schools Student and Family Handbooks](#), NOT in place of. All school stakeholders-- staff, students, and families -- are accountable to and for the information included in all three sections: MNPS handbook, LPS handbook, and LEAD Brick Church Appendix.

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# Academics

## Vision for Effective Teaching

We believe in holding all of our students to high academic standards – and in creating a joyful, safe environment where students can accomplish their goals and be proud of their work.

We place a high priority on intentional relationship building so every student feels connected and known at school. We believe a growth mindset is key to developing world-class scholars who develop the habits and grit to succeed. We have a commitment to daily excellence and strive for the best for our scholars and community.

## Academic Integrity

LEAD Brick Church faculty and administration believe in academic integrity. Students are expected to do their own homework, to test without external resources, and to submit original work for all assignments. LEAD Brick Church scholars are expected to deny all requests to copy from their own work. Students who violate the school's honor code will lose academic points as well as any other appropriate consequences.

## Rigorous Academics and Focus on College Preparation

LEAD Brick Church has a rigorous curriculum that promotes a high level of scholarly engagement through real-world learning.. Below you can find a list, by subject, of our core academic curriculum.

- Math - Achievement First
- English Language Arts - Reading Reconsidered
- Science - FOSS and Tennessee Academic Standards
- Social Studies - Gallopade and Tennessee Academic Standards

## Assessments

At LEAD Brick Church, we believe in giving all students the opportunity to be academically successful by ensuring students get multiple attempts at mastering content standards. In order for students to be successful, they need to experience high quality assessments and have a consistent grading system that tracks their progress along the way. Our grading and assessment policy is implemented with fidelity to ensure all students have the opportunity to be successful.

There are several important assessments that monitor their progress on grade level standards that are expected to be met prior to moving on to the next grade level. Mastering every standard ensures that students are ready for college and ready for life. National or state assessments that students take throughout the year are as follows:

- **Measures of Academic Progress (MAP) exam**
  - *When:* Every fall and spring
  - *What:* Nationally normed assessment that gives students a score and percentile ranking in reading and math, which compares our students to how other students in the same grade scored nationwide.
  - *At Brick Church:* We use the MAP exam to track student growth and it is our goal to grow our students at least one grade level in reading and math every year. We celebrate success and host events to recognize students' hard work.
- **TCAP TNReady**
  - *When:* Each spring during the state testing window (typically around the end of March - April)

- *What:* Middle school students are assessed in ELA, math, science, and social studies.
- *At Brick Church:* We use results from the previous year to make decisions about academic programming and intervention programs that we put in place to best support students toward achieving proficiency (mastering of the grade-level, state academic standards)
- **ACCESS (English Language Learners only)**
  - *When:* Each spring during the state testing window (typically around the beginning of February - March)
  - *What:* Evaluates students in speaking, reading, writing, and listening
  - *At Brick Church:* We use results from the previous year to make decisions about academic programming and intervention programs that we put in place to best support students in their growth in speaking, reading, writing, and listening

In addition to the larger assessments described above, student learning is regularly assessed in classrooms from every subject area, including electives. The results of every scored assessment will be shared with students and their families on progress reports (send every two weeks).

### Assessment Corrections

We offer test corrections to all students in order to demonstrate a growth mindset, along with discipline towards and commitment to our goals.

- Students who score below a 70% on a summative assessment should be encouraged to complete corrections to questions they've answered incorrectly on class assessments.
- Not only does this help students raise their grade, but more importantly, it helps students learn from their mistakes and practice showing mastery on grade level standards.
- During test corrections, students explain in writing, at a minimum, what the correct answer is, how they know, and what misconceptions they had initially. Test corrections are graded for points back, not to exceed an 85. (best practice for weekly summative assessments for all students)
- Test corrections are looked at carefully by teachers who provide feedback.

### Class Grades

At LEAD Brick Church, our goal is to report grades that are accurate, consistent, meaningful, and supportive of learning. Students earn grades based on their demonstration of mastery of TNCore Standards and Tennessee state standards. Grades will include student performance on in-class work, homework, assessments, and other components applicable to each content area. Students will be graded on their mastery of standards using the following grade scale:

Grade	Percent Range	Standards-Based Designation
A (4.0)	90-100	Exceeds Standard / Advanced
B (3.0)	80-89	Meets Standard / Proficient
C (2.0)	70-79	Nearing Standard / High Basic
D (1.0)	60-69	Nearing Standard / Low Basic
F	50-59*	Below Standard / Below Basic

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## Final Grade Calculation

A student's final grade is a representation of student mastery of the Tennessee Academic Standards. Students have the opportunity to show mastery based on four grading categories, each category represents a specific percent of the students final grade. See grading categories and the final grade percentages below.

Summative Assessments 35% of a Student's Grade		Formative Assessments 35% of a Student's Grade			Classwork 30% of Final Grade		
Tests	Projects, Essays	Quizzes	Homework	Exit Tickets, Classwork (Accuracy)	Classwork (Completion)	Attendance	Participation
50-100 points	30-100 points	20-30 points	5-20 points	5-20 points	5-10 points	5 points	5 points

## Progress Reports and Report Cards

In order to ensure we communicate student academic progress consistently with parents, progress reports are distributed every other Tuesday to LEAD Brick Church students. Progress Reports are to be signed by a parent or guardian and returned to the student's Crew teacher on Wednesdays.

Report cards are sent home with students after the start of quarters two and three. Student's quarter four report card will be mailed after the last day of school. Quarterly report cards do not come home on the last day of each quarter because teachers must finalize grades that occurred that week. **Notices of academic concern also go home with any students who are failing one or more core content classes.**

Any concerns parents have about grading should be addressed to the Classroom Teacher and Assistant Principal of Instruction, (and School Principal, as necessary).

***If parents/guardians do not receive progress reports or report cards for his or her child, please contact your child's Crew teacher or the front office immediately. See LEAD Brick Church Staff Directory.***

## Failing Grades

At the end of each quarter, failing students receive a notice of concern to be signed and returned by families. Additionally, a list of failing students within each grade level will be provided by the Assistant Principal of Instruction to allow GLTs to prepare for Parent-Teacher Conferences.

- Q1: Report card home and *Notice of Academic Concern* and *Notice of Required Academic Meeting* (for students failing 2 or more core classes).
- Q2: Report card home and *Notice of Academic Concern* and *Notice of Required Academic Meeting*.
- Q3: Report card home and *Notice of Academic Concern* and *Notice of Possible Retention*: Required parent meeting for retention letters.
- Q4: Report card home and *Notice of Retention*: Required parent meeting.



## Retention Policy

At LEAD Brick Church we believe that in order for students to be Ready for College and Ready for Life students must first master core academic standards in their individual grade by the end of the academic school year. Students that fail to meet the academic requirements necessary to show standard mastery across four quarters will be subject to retention at the end of the school year. Below you can find student retention indicators:

Students who meet the following indicator will be recommended for retention at the end of the 2021-2022 school year.

- Students that receive a cumulative average of an F in two or more core academic subjects.

## Celebrating/Recognizing Academic Progress and Achievement

We recognize and celebrate those students who earned honors as evidenced by their academic performance and grades earned in their classes. Every quarter, we invite families to attend an Honors Ceremony. The honors designations can be found below.

- Summa cum laude - Average of 95%+ with all grades 93% and above
- Magna cum laude - Average of 90% - 94% with all grades above an 85%
- Cum laude - Average of 85% - 89% with all grades above an 80%

In addition to recognizing those students who have earned honors, we also recognize students who have made significant academic growth as evidenced by meeting their 1 year growth goal on MAP at the conclusion of the year.

## Extracurricular Activities

All students participating in extracurricular activities are required to conduct themselves as role models, to demonstrate good citizenship, and to comply with all rules and regulations of Brick Church.

# School-Wide Systems

## Dress Code

Students are expected to be in dress code everyday. We are revising our past dress code expectations to ensure all families have access to clothing that best meets their financial needs, while also adhering to a consistent dress code so that students are prepared for class without wardrobe distractions. Here are the dress code specifics:

- **Shirts**
  - **All grades:** Students must wear a collared polo shirt. Students will receive a LEAD branded polo when they enroll. Polo shirts should be school colors (red or blue) or neutral colors (black, white, gray) and cannot have large logos other than LEAD logos.
  - During cold months, students may wear any solid color long sleeve shirt underneath their polo
- **Pants**
  - Black, navy, green, or tan khaki pants
  - Pants must be professional “khaki/docker” material
  - No jeans, no leggings, no other color khakis
  - Students may wear black, navy, green, or tan khaki shorts and skirts as long as they extend past the student’s fingertips when their hands are at their sides
- **Shoes**

- Closed-toe shoes
- Students can wear any color shoes they'd like as long as they are closed-toe and have a back
- Students may wear sneakers, boots, flats, or Crocs
- Shoes must be appropriate for participation in PE and/or active recess - students wearing Crocs must bring sneakers for PE
- Students may not wear sliders or sandals
- **Outerwear**
  - Sweatshirts or hoodies are permitted if they are a:
    - LEAD Brick Church logo
    - College name or logo
    - Solid color without logos, preferably in school colors
  - The dress code polo must be under any sweatshirts or hoodies
  - Students may not wear blankets throughout the school day
  - Students are always encouraged to wear a coat or jacket to school on cold days. If the coat or jacket does not have a LEAD Brick Church or college logo, the student will simply take it off when entering the building.
- **Accessories**
  - Students may never wear paisley print bandanas to school of any color
  - Students may wear solid headbands
  - Students may wear jewelry that does not distract from the learning environment

Because we want the LEAD Brick Church student wardrobe to be free of distractions, students should not bring any items to school that are not needed for a day of learning or are not part of the school uniform. For example, students may never bring in toys, stuffed animals, balloons, hats clipped around belt loops, or blankets.

If a student has not received a reminder or demerit by the end of the day on Thursday, he or she may wear jeans and a LEAD Brick Church branded or college shirt on Friday. Jeans may be any color, but must be school appropriate. Jeans may not have rips that expose legs above the knee and may not be leggings.

## **Cell Phones**

Many families would like to have a means to communicate with their student before or after the school day. However, cell phones are distracting during the day. Students may NEVER use their cell phone during the school day.

If a family is trying to reach their child, they must call the main office and the student will be pulled from class. Please do not call or text your student during the day. If a student's phone is in use during school hours, the phone may be confiscated and locked in our main office until a guardian comes to retrieve it.

Here are the student cell phone expectations:

- Turn cell phones off and place in backpacks before entering school
- Once inside the school building, all cell phones must be off / in airplane mode and put away in backpacks
- Student is responsible for keeping phones safe. School is not responsible for any lost or missing phones
- Cell phones must be in backpacks, NOT in pockets. Cell phones in pockets will be taken if a student refuses to put it in his or her bag
- Cell phones must stay off and be in bags until students are on the bus or out front at dismissal
- Students may never play music or stream video out loud from their phone when on campus
- Students may never use cell phones to record other students while on school property, including the school bus and city bus stops

## Food/Snacks

We want to provide a healthy environment for our students. Students are not allowed to have gum, candy, chips, soda, or energy drinks in class. During class, any of these types of food will be confiscated. The exception to this is during homeroom when breakfast is served from 8:30-8:50.

We do have a school store available weekly during the lunch/recess period where students can purchase snacks or treats with their Bear Bucks. Students may eat their snacks or treats in the cafeteria only and must place all leftover items in their backpacks to take home after lunch ends.

Students are not allowed to eat in class. Students should bring a water bottle to school. Students will have the opportunity to fill their water bottles during designated times during the day. Water fountains are no longer available and have been replaced with water filling stations.

## LEAD Brick Church Paychecks

Each week, students begin with \$100 Bear Bucks. They gain and lose points (dollars) based on their behaviors at school. Student paychecks are sent home every Tuesday in red folders for parents to view and sign. The positive points are called plus points or Ethos points. The negative behaviors found on paycheck are called reminders and demerits.

We value consistency in our school because it is the foundation of providing a safe and predictable environment for our students and staff. Providing our students with rewards and consequences requires a strong commitment to consistency. Our commitment to consistency and academic success is how our students will know that we care about their well being.

Our system strives to do the following:

- 1) Consistently recognize our students for exhibiting the behaviors we value
- 2) Create investment in our systems by recognizing and rewarding appropriate behavior
- 3) Provide consistent corrections to behaviors that do not demonstrate LEAD Brick Church values or ethos and tie this correction to the appropriate behavior

In order to do this we have provided the following token economy for Bear Bucks at Brick Church that are based upon our Ethos:

### Ethos and Positive Points

Our core Ethos are the following: Serve Others, Committed, Courageous, Self-Reliant and Disciplined. Students can earn between +1 and +3 Brick Church Cash for displaying behaviors that exemplify these Ethos. We want to encourage those above and beyond behaviors to serve as examples for both the student and their peers. Our goal with awarding above and beyond Ethos points (+3) is to recognize when students are going outside of the normal expectations and showing a commitment to our Ethos and living out our values as a school (diversity, growth mindset, excellence, flexibility, humanity, and joy). To make these positive, teachable moments, it is also important for us to provide rationale of why a student earns the +3. This helps the student focus on the behavior to replicate instead of just the points earned. We never reward Ethos points to students who ask for the points. The goal is for students to exemplify the Ethos and earn recognition, not to “pay” them for doing good deeds. Further, when we consistently recognize students for their

Our students work hard each and every day. It is important that we recognize and encourage those positive behaviors so that we can reinforce the productive behaviors the students are exhibiting. Our goal is to constantly build our students up to be

the best people they can be. Though it is important to point out the behavior that is holding a student back, it is more important to acknowledge the behaviors that are pushing our students forward. Along those lines, we want to encourage the positive habits students are displaying. For those reinforcers, students can earn a (+1) point in our different points categories. These +1 incentives can also be thought of as arrows inside the lanes that point out when a student is on the right track for success.

## Correction and Consequence

### Minor Behaviors - Reminders

Minor behaviors refer to actions that distract or deter the learning process. These do not necessarily make learning or continuing the lesson impossible for the student or the class, but they are behaviors that we want students to curb or replace with more productive actions. A minor behavior that has been redirected and continues, warrants a (-1). We want to be consistent with our expectations and consequences, so (-1) is not a warning. They are not precursors to a demerit, nor do they culminate or add up to a demerit or major behavior. Reminders are about how to have positive habits in the classroom.

Think of a bowling alley. When a student does something that warrants a (-1), it is as if they are hitting the bumpers along the lane. Teachers can provide redirection for the student to get back on track when assigning a (-1), letting them know where the boundary is.

One example of a minor behavior that would earn a reminder is when a student is fully engaged in the lesson, but calls out the answer to a question when the teacher has asked for hands. A teacher could respond with, "I can tell that you're excited to share your thinking with the class, but when we call out, other teammates lose the opportunity to participate as well. Let's remember to raise our hands before we speak; that's (-1).

Here, the teacher creates a learning opportunity by providing rationale to the student before issuing the consequence. The student is able to see how his/her action has a direct effect on learning in the classroom, and the teacher has given the student a more preferred, replacement behavior for the calling out.

Reminders (-1)	Examples (Not exhaustive)
Talking	Talking out of turn Inappropriate volume Making inappropriate noises
Off Task	Reading a book instead of focusing on lesson Drawing on paper Dozing off Combing/Braiding Hair in class Chewing gum/eating Kicking the table or chair Making any unnecessary noises in class or at whole school events Pencil tapping, drumming, singing/rapping in class Slamming book or door Kicking the table or chair Making any unnecessary noises in class or at whole school events Pencil tapping, drumming, singing/rapping in class
Dress Code	Wearing hood in building, for example <i>*Dressing for success is important to help us cut down on the amount of distractions that take away from learning time. We all have a uniform we wear that shows that we are</i>

	<i>present and ready to work.</i>
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### Major Behaviors - Demerits

Everyday we strive to make sure our kids feel safe and respected while they are learning. Therefore, in the instances in which students choose to stop the learning environment by being disrespectful or creating an unsafe learning space, it is considered a major behavior and warrants a demerit (-3).

If (-1) is used to guide students like bumpers in a bowling lane, marks are used in times when students are no longer operating in the lane at all. Here, it is vital that teachers provide rationale for why a mark is given. The delivery of the mark must always include an explanation. This offers students an opportunity to change or make a better choice and not just receive the consequence.

For example:

*“Jenny, when you are in the hallway without a pass, it means an adult may not know where you are. It is important, for your safety, that an adult knows where you are at all times. Next time, please make sure you have a pass. That’s a mark because at Brick Church we are disciplined by being in the correct location at all times.”*

If a behavior is egregious enough to warrant a mark, keep in mind that a repair conversation will be necessary to have with that student. Consequences are more meaningful when students know that they are given out of love and respect. It’s natural for there to be negative feelings when a mark is assigned, however, as educators, it is our responsibility to help repair and build a positive relationship with the student. In addition, it is important to call home after issuing a mark, so that parents are brought into the conversation and we are continuing to build the partnership between school and home. It may not be necessary to call home after EVERY mark, but if a teacher finds themselves issuing more than one mark to a student in only a couple days OR they notice a pattern of the type of mark emerging in the child’s Kickboard account, a phone call home is made.

Demerit Examples
<ul style="list-style-type: none"> <li>● Horseplaying or throwing objects</li> <li>● Copying or cheating</li> <li>● Public display of affection</li> <li>● Calling someone a negative name</li> <li>● Pushing/kicking/hitting someone</li> <li>● Using profanity</li> <li>● Minor damage to school property such as writing on a desk or wall</li> <li>● Refusing to follow specific direction</li> <li>● Skipping class</li> <li>● Being anywhere in the building without permission and a pass</li> </ul>

### Student Culture & Support Crew Dens

Crew is a joyous and formative experience that fosters connectedness within our community. We believe that if every student has at least one adult in the building that knows them on a deeper level, they are more likely to feel safe and included at school. Crews are named after bears and we have three dens school-wide: Grizzly Bears, Polar Bears, and Panda Bears. Each staff member is assigned to a den and leads weekly social/emotional lessons created by our school counselors that focus

on student needs. Crew teachers are an advocate for the students in their crew and are the point person for families to call with questions.

### Top Point Earners

We believe it is important to recognize our students who go above and beyond for their education and for their school community. Students are issued positive and negative points throughout the week based on behaviors they exhibit. Those who meet all school expectations and are demonstrating our Ethos are issued merits throughout the week by teachers and staff. These students are our highest point earners in the school and we celebrate them in the following ways:

- **Weekly Free Dress:** Each Friday, the top two point earners in each grade level will be announced and will be given a free dress pass for the following week. If there are more than 2 students who qualify because their points are tied, all students who qualify will be granted free dress. Any repeat winners within a quarter will get free dress but will not occupy one of those top two spots, so the next highest will also get free dress.
- **Bear Claws:** Each time a student is a top point earner and earns free dress, he/she also collects a Bear Claw. Students can collect Bear Claws throughout the year to earn elevated rewards.
- **The No Negative Nation:** Students who go the first three weeks of each month without losing any points from their paycheck will have increased freedoms and various rewards during the fourth week of the month. The freedoms and rewards may change monthly.

### School Conduct Policies

In reference to behavioral offenses and corresponding consequences, LEAD Brick Church adheres to the policies outlined in the [Metro Nashville Public Schools Student-Parent Handbook](#).

### Additional School Rules & Procedures

Topic & Rationale	Rule or Procedure
<p><b>Student supply kits</b></p> <p><i>Basic school supply kits ensure that students are always prepared to fully engage in learning.</i></p>	<p>It is helpful if each student maintains a school supply kit that includes:</p> <ul style="list-style-type: none"> <li>• Backpack</li> <li>• 1 2" binder</li> <li>• Pencil case</li> <li>• 3+ pencils with erasers</li> <li>• 1+ pens</li> <li>• Highlighter</li> </ul>
<p><b>Common hand signals</b></p> <p><i>In order to minimize distraction in classrooms, we ask that students use the following basic hand signals to ask for specific needs</i></p>	<p>Hand signals are all done silently and are used in all school spaces, including cafeteria, gym, auditorium</p> <ul style="list-style-type: none"> <li>• Pencil in air = sharpen pencil</li> <li>• Pointer finger in air = need a pencil/utensil</li> <li>• Raise ASL letter R (crossed fingers) = bathroom</li> <li>• One hand raised, one hand over nose = kleenex</li> <li>• Raised ASL letter T (fist with thumb between index and middle finger) = trash</li> <li>• Tap wrist = need more time</li> </ul>
<p><b>Bathroom</b></p>	<ul style="list-style-type: none"> <li>• Empty pockets and leave your bags in the classroom</li> <li>• You must have a pass</li> <li>• Five minutes or less to the bathroom</li> </ul>

<p><i>Class time is valuable. Students should be in classrooms at all times. There is also a safety piece involved. We are responsible for students at any and all times of the day. This involves knowing their whereabouts. Specific bathroom time windows may be created if a pattern of destructive or unsafe behavior emerges.</i></p>	<ul style="list-style-type: none"> <li>● Two bathrooms per day in addition to breakfast and lunch</li> <li>● Leave the place cleaner than you found it</li> <li>● Bathrooms are closed 10 minutes prior to dismissal at the end of the day</li> <li>● <b>5th graders</b> may only use bathroom in 5 / 6 hallway (unless in library or electives or at lunch)</li> <li>● <b>6th graders</b> may only use bathroom in 5 / 6 hallway (unless in library or electives or at lunch)</li> <li>● <b>7th graders</b> may only use bathroom in 7 / 8 hallway (unless in library or electives or at lunch)</li> <li>● <b>8th graders</b> may only use bathroom in 7 / 8 hallway (unless in library or electives or at lunch)</li> </ul>
<p><b>Water</b></p> <p><i>While access to water throughout the day is important, students are known to use “getting water” as an excuse to leave class. These procedures help preserve class time while addressing potential needs.</i></p>	<ul style="list-style-type: none"> <li>● Students are expected to bring a water bottle to school</li> <li>● Students need to fill up water bottle on trips to the bathroom and during lunch/recess</li> </ul>
<p><b>Sharpening Pencils</b></p> <p><i>Students need to arrive for the day prepared for school, which includes more than one pencil.</i></p>	<p>Students are expected to:</p> <ul style="list-style-type: none"> <li>● Carry a hand held sharpener</li> <li>● Use homeroom time to sharpen at least 3 pencils for the day</li> <li>● Only sharpen pencils when the teacher is not providing direct instruction</li> <li>● When you go to the sharpener, sharpen more than one pencil</li> </ul>
<p><b>Nurse</b></p> <p><i>The nurse is here to provide emergency services to students in need and services to our students with prior medical needs.</i></p> <p><i>When it comes to students going to the nurse, most visits to the nurse are to escape class.</i></p>	<ul style="list-style-type: none"> <li>● Students will only be sent for genuine need and absolute emergencies e.g. pink eye, throw-up, very high temperature, etc.</li> <li>● Examples of when students will not be permitted to leave class and go to the nurse: bandage for minor scrapes (all teachers have bandaids in class), stomach ache, non-descriptive complaints of “not feeling well”</li> <li>● Teachers will use best judgement to determine whether or not the student needs to see the nurse - when at all possible, teachers will keep students in class so that they don’t miss instruction</li> <li>● The nurse will log students in and note name, class, reason for seeing nurse -- investigate reasons for repeat visitors</li> </ul>
<p><b>Feminine supplies</b></p> <p><i>Students should arrive at school prepared.</i></p>	<ul style="list-style-type: none"> <li>● Students need to bring their own supplies, but can ask for them in the main office in the case of emergencies.</li> </ul>
<p><b>Outside food</b></p> <p><i>During breakfast and lunch, food from restaurants will not be allowed to be eaten in our public spaces.</i></p>	<ul style="list-style-type: none"> <li>● Students and parents may bring in breakfast or lunch from outside restaurants.</li> <li>● Students will not be allowed to eat during classes.</li> <li>● If parents drop food off for a student, it must be during the regularly scheduled lunch break. Food dropped off outside of the regularly scheduled lunch break will be held in the main office until the end of the</li> </ul>

	<p>school day.</p> <ul style="list-style-type: none"> <li>• Please refer to the previously stated rules in this appendix and in the LPS handbook regarding families bringing in lunch or treats</li> </ul>
<p><b>Microwaving student lunches</b></p> <p><i>We have a large number of students and cannot accommodate this for every child.</i></p>	<ul style="list-style-type: none"> <li>• Students are never allowed to heat up lunch in the microwave or use the refrigerator to store packed lunch</li> </ul>
<p><b>Writing on skin, clothes or shoes</b></p> <p><i>Writing on clothes or skin is unprofessional and signifies that the student was not engaged in learning during class.</i></p>	<ul style="list-style-type: none"> <li>• Students are not allowed to draw on their skin, clothes, or shoes</li> <li>• Having writing on your clothing is breaking the dress code</li> </ul>
<p><b>Prohibited supplies and materials</b></p> <p><i>We take pride in our school property and permanent markers &amp; gum can be destructive to walls, desks, clothes, etc.</i></p>	<ul style="list-style-type: none"> <li>• Students may not bring sharpies or flair pens to school or chew gum. All sharpies and gum found will be taken from students</li> <li>• Students may only use pencils and pens to complete classwork: no markers or glitter gel pens</li> <li>• The following are never allowed at school: glass bottles, gum, and sharpies</li> <li>• The school reserves the right to determine if a school material is too distracting to instruction. For example: jumbo size pencils or pens, toys, candy, etc.</li> </ul>



# Procedures & Policies

## Attendance

In order for students to be ready for college and life, we need them at school, on time, everyday.

Absenteeism may affect the final grade a student receives in any class, as well as impact services provided for those students working from IEPs. We support students and families in maintaining regular attendance.

The school day starts at 8:30am and ends at 4:00pm Monday-Friday. Doors open at 8:30 and homeroom begins at 8:40. All students should be cleared from the building no later than 4:15pm each day.

\* Note: Students must be in school for at least 3.5 hours in order to be considered present for the day.

## Tardy to School

- A student is considered tardy at 8:46am and must sign in the main office.
- Students arriving late must have a guardian escort them into the building to check them in for the day.

## Absences

- As a public school, LEAD Brick Church adheres to state guidelines regarding truancy.
- Students must turn in a parent hand-written excuse note or a doctor's note within 3 days of their return.
- LEAD Brick Church only allows 5 hand-written excuse notes per school year. The note must include the student's name, date of absence, reason, parent signature, and phone number.
- If a student is absent 3 consecutive days or more, he/she must have a medical note to excuse his/her absence.
- It is the parent and student's responsibility to provide the school with an excuse note; failure to bring this note will result in an unexcused absence.
- Ten (10) consecutive days of absences will result in a student being unenrolled from school.
- Falsely representing a parent/guardian and/or his/her signature in any way is a violation of the Code of Conduct and will result in disciplinary action.
- If a student is absent from school, he or she is not allowed to participate in any after school events that are school-based: athletic practice, sports games (to play or to watch), clubs, NAZA, etc.

**Excused Absences** (It is the student's responsibility to arrange for all make-up work following an excused absence. LBC defines excused absences as those due to one or more of the following:)

- Illness
- Medical/Dental, including appointments
- School-sanctioned activities
- Absences related to the legal system
- Family Emergency
- Bereavement/Funeral
- Religious observances

**Unexcused Absences** (An absence from school is unexcused if it does not meet the criteria for an excused absence)

Students who are absent from school and who fail to return to school with a note signed by a parent/guardian explaining the absence will be given an unexcused absence. Assignments given that day will result in a zero. This includes tests and quizzes.

## Chronic Absenteeism

A student is considered chronically absent if he or she missed 10 percent or more of the instructional days they are enrolled. This includes all absences (excused, unexcused, or due to suspension). Research shows that students who miss more than 10 percent of school days are far less likely to graduate high school on time.

## Tennessee Compulsory Attendance Laws

(Compulsory School Age is 6 Years to the 18th Birthday)

T.C.A. 49-6-3001 – School Age - (c) (1) Every parent, guardian or other person residing within this state having control or charge of any child or children between six (6) years of age and seventeen (17) years of age, both inclusive, shall cause such child or children to attend a public or non-public school, and in the event of failure to do so, shall be subject to the penalties hereinafter provided. (The courts have ruled that the word "inclusive" requires a child to attend school until the day before his/her eighteenth birthday.)

T.C.A. 49-6-3007 – Attendance and truancy reports. - (e) (1) It is the duty of the principal or instructor of every public, private or parochial school to report promptly to the superintendent, or to the superintendent's designated representative, the names of all children who have withdrawn from school, or who have been absent five (5) days (this means an aggregate of five (5) days during the school year and not necessarily five (5) consecutive days) without adequate excuse. Each successive accumulation of five (5) unexcused absences by a student shall also be reported.

T.C.A. 49-6-3009 – Penalty for Violations - (a) Any parent, guardian or other person who has control of a child, or children, and who violates the provisions of this part commits a Class C misdemeanor (b) Each day's unlawful absence constitutes a separate offense.

T.C.A. 40-35-111 – Terms of Imprisonment or Fines - (3) Class C misdemeanor, not greater than thirty (30) days or a fine not to exceed fifty dollars (\$50.00), or both, unless otherwise provided by statute.

## Early Dismissal

- Must be arranged prior to departure and a parent/guardian or pre-approved representative who is 18 years of age or older and who has a photo ID, must report to the Main Office and sign that student out prior to the student being dismissed.
  - Siblings, persons unrelated to the student, or persons under the age of **eighteen (18)** will not be permitted to sign out a student. ONLY pre-approved adult representatives will be permitted to sign out a student after showing ID.
- If a child attends less than one half of a school day, the student will be marked as absent. A written excuse note or doctor's note should be turned in to the front office for this to be considered an excused absence.
- In order to maintain and safe dismissal, you will NOT be able to do the following past 3:45 pm each day:
  - Call and request the Main office to communicate a message to your student.
  - Bring an item to the Main office for us to deliver to your student.

## Missed Work

- LEAD Brick Church follows MNPS's guidelines for make-up work.
- Makeup work must be requested by the student or parent no later than three days after returning to school or he or she may forfeit the opportunity to complete the work. Teachers are required to have a designated place in their classroom for students to collect missed work.
- The work must be turned in by a mutually agreed upon time frame between the teacher and student.

## Before & After School

To ensure the safety of all students, we have specific guidelines for student arrival and dismissal.

### Morning Arrival

- At 8:30am, the LEAD Brick Church school doors open to students and our main office opens.
- Students are expected to wait outside respectfully and should NOT engage in any unsafe behaviors or activities.
- Staff is not permitted to allow students into the building as there is no supervision of students until 8:30.
- If you have concerns about your child waiting outside in inclement weather, please make plans for them to arrive at school as close to 8:30 as possible. Weather does not change the policy of when our doors open.

### Dismissal

- Early checkouts are not permitted after 3:30pm.
- At the end of each school day, car riders are called for dismissal at 4pm.
- Car riders will exit through the front doors. Families should be in the pickup line by 3:55pm.
- Bus riders are escorted to the cafeteria at 4pm and dismissed to their buses by school staff.
- Students are NOT ALLOWED to return to campus once they have left.

### Late Pick-up

- Adults stay with car riders after school until 4:15. At that time, all adults are relieved and students are not allowed back into the building but may wait in front of the school or, in the event there is inclement weather, in the security vestibule at the front of the building.
- Students who are waiting outside after school will be brought inside for late pickup at 4:15pm.
- If you are running late for pickup, please call the school.
- Please be mindful that in the months of October-January, it becomes dark early in the afternoon and students should not be waiting outside of school in the dark. Please make arrangements for someone to pick up your child before it becomes dark.
- In the event of a school bus running late at dismissal, students from that bus will wait with school staff in a designated location until their bus arrives. Students will be allowed to call parents to inform them of the delayed bus. An all call to families will also be sent if buses are expected to arrive at LEAD Brick Church after 4:25pm.

## Students Staying After School

- To participate in clubs and sports:
  - Students are expected to report to the cafeteria during dismissal.
  - Coaches and club leaders pick up participants from the auditorium at 4:15.
  - If students leave school, they may not re-enter to participate.

- Students must have a ride home from practice and club meetings. The school is not responsible for transporting students home.
- Parents are expected to pick up students at the time determined by the coach or club leader. Students who are not picked up by this time may no longer be allowed to participate in the club or sport, at the leader or coach's discretion.
- To attend sporting events:
  - Must have turned in a signed permission slip to stay after school to attend the sporting event. A phone call the day of will not suffice as the school must have written permission.
  - Must have a ride home. The school is not responsible for transporting students home from after school events
  - Students staying after school to attend a sporting event are not allowed to leave campus and then return to the "stay after" group. If students leave campus and want to return to attend a sporting event, they must return with a parent.

### **Emergency & Inclement Weather Days**

In the event of particularly dangerous weather conditions, LEAD Brick Church will either cancel or delay the opening of school. Such announcements will be made on local news channels as well as a text blast through TalkingPoints.. Please note that we will follow Metro Nashville's lead on cancellation or delays. On such days, please do not call the school as all information on school cancellations or delays will be reported via the television and radio by Metropolitan Nashville Public Schools (MNPS).

### **Families Visiting Students or Observing Their Child in Class**

If you are requesting a quick conference with your student during the school day, your child will be brought to the main office for you to speak with him/her. LEAD Brick Church does not allow families to come eat with their student in the cafeteria, unless the parent is shadowing the student for the day. Additionally, bringing in celebratory food for students and their friends is prohibited- no pizza, cupcakes, or birthday celebrations are allowed as it excludes others and creates conflict among students.

We love when families visit and welcome guests in our classrooms. If you are interested in observing your child in class, you must reach out to the teacher of the class and let him/her know you'd like to sit in. When you come into the school for an observation, you will sign in at the main office and review the Parent Observation Guidelines with a staff member. It is important to us to allow families to see what learning looks like at LEAD Brick Church, but we are also aware of how some visits can be distracting or even embarrassing for students in class.

Because learning is our top priority, we have created the following guidelines for parent observations:

#### **Parent Observation Guidelines**

Thank you for coming in to see your child's classroom! We are excited to have you and appreciate our partnership in providing an excellent education to your child.

Below are some guidelines we have put in place to preserve the classroom environment during your time here:

1. Introduce yourself to the teacher.
2. Do not distract or interact with other students or your own child during class unless the teacher asks you to participate.
3. Please refrain from using your phone/technology while in the classroom. We want to make sure the students are not easily distracted by having a guest using technology.
4. Write down any questions or comments you have.

5. If you are not staying until a transition time, leave your phone number with the teacher so he/she can follow up with you after.

## **Personal Belongings**

LEAD Brick Church assumes no responsibility for any loss of students' personal property or for items such as (but not limited to) cameras, cell phones, iPods, tablets, handheld game systems, toys and cards.

Parents and students are advised that it is a violation of school code to use these personal items during school hours. Items in use during school hours will be confiscated and appropriate disciplinary action will be taken. Confiscated items will have to be picked up by the parent in the front office.

The following items will be immediately confiscated if brought to campus: skateboards, skates, roller blades, TVs, large electronic game systems (PS2, GameCube, etc.), basketballs, footballs, flat irons, curling irons, or aerosol cans (hair spray, deodorant, etc.), and other items deemed inappropriate. Inappropriate items will have to be picked up by the parent in the front office.

Basketballs and footballs will be provided during recess by the school.

Student property that is traditionally considered confidential (journals, purses) will be turned over to the Principal and/or Assistant Principal if it is found to pose a risk to its owner or anyone else.

## **Lost and Found**

Items that have been found should be returned to the Office Manager. Students who have lost an item at school may come to the Office during a break or before or after school to check for lost items with written permission from his/her teacher. All items not picked up at the end of each month will be donated.

## **Parent Conferences and Parent Nights**

We encourage parents to set up conferences whenever you would like to sit down and discuss your child's progress. Additionally, teachers or administrators may contact you to set up conferences. There will be days and times throughout the year that are open to families who want to come in. Look for these specific days in the weekly notes in student binders, DeansList communications, or our social media pages (Instagram and Facebook). We encourage all families to attend night events and to stay current on and involved in school happenings. These days and times will also be in the weekly notes in Red Folders, the Brick Bulletin, or our social media pages (Instagram and Facebook).

## **Use of Tobacco**

LEAD Brick Church promotes and maintains a smoke-free environment. All LBC employees, scholars, parents, guests and vendors are prohibited from smoking or using tobacco products. Students may not have tobacco in their possession at any time during the school day, at any school-sponsored activities or on any school grounds. Students in violation of the tobacco/smoking regulation will be subject to disciplinary action including expulsion.

## **Property**

All students are expected to respect and care for all property of LEAD Brick Church including building facilities, desks, dry erase boards, dry erase markers, books, lavatories, lockers, belongings of scholars/staff, etc. Sharpies and Markers are prohibited items that damage property and will be taken if student is in possession of it. Any student damaging or defacing property may be required to pay for the damage or loss, including professional labor costs. Willful destruction or defacement of property at any time is just cause for disciplinary action and may result in expulsion.

## Theft

Committing an act of theft may result in suspension and other disciplinary actions. The student will also be required to pay for or replace the item(s) stolen. Proper outside authorities may be contacted. Any student involved in theft will be denied participation in school activities for a certain period of time to be determined by proper school authorities.

## Search and Seizure

School authorities may seize any contraband, substance, or object, the possession of which is illegal or any material or object that violates a school rule or poses a hazard to the safety and good order of the school. Students are not to bring these items to school or to any school-sponsored function.

1. *Authority to Conduct a Search* - The law allows school authorities to search students, their lockers, their motor vehicles and personal property when they have reasonable suspicion that a particular student is in possession of something prohibited by school rules or by law.
2. *General Inspection* - School authorities reserve the right to make general inspections for purposes including but not limited to safety, cleanliness, retrieval of school material, and maintenance. Such general inspections shall not include searching personal items stored in clothing, bags or purses, unless reasonable and specific suspicion exists.
3. *Desk/Storage Area Inspections* - All storage areas provided for student use on school premises remain the property of the school and are subject to inspection, access for maintenance, and search.
4. *Personal Searches* - A student's person and/or personal effects (e.g., purse, backpack, etc.) may be searched when school authorities have reasonable suspicion to believe that the student is in possession of illegal or unauthorized items.

Any student who refuses to submit to a reasonable search by school authorities will be subject to disciplinary action. School authorities may detain the scholar pending the notification and arrival of the student's parent/guardian and/or law officials as appropriate.

## Bus Expectations and Code of Conduct

LEAD Public Schools will provide busing for your student to and from school within the "school zone" limits of Nashville and is more than 1.25 miles from school. If a student is less than 1.25 miles away from school, they are designated as a walker or can be dropped off at school by a legal guardian. This is a service we provide to assist our families. However, busing is considered a privilege and if policies and behaviors are not adhered to, bus privileges can be revoked. In order for the school to maintain safe and efficient bus service, all families who choose to use our buses must agree to the code of conduct and policies. Students, who are bus riders, must be at their bus stop 10 minutes prior to the assigned time and prepared to wait 10 minutes after if needed due to traffic patterns.

## Athletics Policy

The following is from the TMSAA athletic policy:

- **Age:** Any student who becomes **15 years of age before August 1** is not eligible for athletic participation.
- **Sports Physicals:** MNPS Middle School bylaws state that all sports physicals must be given after April 15<sup>th</sup> of the **current school year**.
- **Length of participation:** Middle School students are allowed on **six consecutive semesters** of eligibility for athletic purposes. The semester counts begin the first day a student **enters the 6<sup>th</sup> grade** and is inclusive of all schools attended, not just Brick Church .
- **Grades:**
  - **Fall:** Review previous/last semester's grades. If a student failed two classes, the student is ineligible.
  - **Spring:** Review previous/last semester's grades. If a student failed two classes, the student is ineligible.

The following is Brick Church -specific and begins from the time of the first game:

- Any student not at school is unable to **play in that day's game or participate in practice. He/she may not attend either. This is true even if the absence is excused.**
- Any student suspended more than once before or during the season in that same school year will not be able to be a player of the team.
- Coaches and Athletic Directors are required to monitor DeansList for behaviors. (Daily/Weekly). Coaches and Athletic Directors are empowered to work with teachers/staff to address any/all student issues.
- Any student that is sent to R&R will not be eligible to play in a game the same day.
- Students who are sent to R&R or earn three or more demerits during the day will be reported to the Coach/AD who will make a decision regarding the student's ability to practice, or attend a game/practice.
- Any student failing one or more classes for longer than 1 month will not be allowed to play until he/she brings grades up to passing. (Monitored by Coaches, Teachers, AD)
- Any student who has more than one unexcused absence in the span of any given two weeks is ineligible to play in games that current week.
- Any student who is tardy more than two days in a week is ineligible to play in games that week.

**Note: Decisions around eligibility and participation, beyond TMSAA requirements, are ultimately at the discretion of the Principal, Assistant Principal of Students, and Athletic Director.**

### School Resources & Tools for Families

Resource	How to access	Details
Facebook	Search facebook for "The LEAD Brick Church Family" or go to this URL <a href="https://www.facebook.com/groups/242255186827001/">https://www.facebook.com/groups/242255186827001/</a>	<ul style="list-style-type: none"> <li>• Updates about school events and calendar</li> <li>• Student Celebrations</li> <li>• Community events</li> <li>• Inclement weather updates</li> </ul>
Instagram	@leadbrickchurch	<ul style="list-style-type: none"> <li>• Updates about school events and calendar</li> <li>• Student Celebrations</li> <li>• Community events</li> </ul>
DeansList	Deanslist Family Access Video You will be given an access code for your student's Deanslist at Family Orientation Night.	App where you will receive updates and attached documents from the school and individual teachers related to: <ul style="list-style-type: none"> <li>• Grades</li> <li>• Behavioral Progress</li> <li>• School calendar and events</li> <li>• Any school, grade, or class updates or announcements.</li> <li>• Access your students merits, demerits, and scorecard average</li> <li>• See notes from their teachers</li> </ul>
Illuminate	<a href="#">Illuminate Family Access Video</a> You will be given an access code for your student's Illuminate at Family Orientation Night.	<ul style="list-style-type: none"> <li>• Access your students grades</li> </ul>
School Counseling Website	<a href="https://sites.google.com/leadpublicschools.org/brick-counseling/home">https://sites.google.com/leadpublicschools.org/brick-counseling/home</a>	<ul style="list-style-type: none"> <li>• Community resources in English and Spanish</li> </ul>

School Website	<a href="https://leadpublicschools.org/schools/brick-church/">https://leadpublicschools.org/schools/brick-church/</a>	<ul style="list-style-type: none"> <li>● School calendar</li> <li>● Family Resources</li> <li>● Links</li> </ul>
Infinite Campus	<p>You will be given a username and password at Family Orientation Night. You can access Infinite Campus by:</p> <ul style="list-style-type: none"> <li>- Go to <a href="http://familyportal.mnps.org">familyportal.mnps.org</a></li> <li>- Click 'Campus Parent'</li> <li>- Enter the given username and password</li> </ul>	<ul style="list-style-type: none"> <li>● Student grades</li> <li>● Student schedule</li> <li>● Student attendance</li> </ul>
Teachers (Direct Contact)	<p>Teachers provide all students with their contact information at the beginning of the school year and/or when a new student enrolls.</p> <p>All teachers have an email address that is <code>firstname.lastname@leadpublicschools.org</code>  Example: <a href="mailto:kathryn.mckinzie@leadpublicschools.org">kathryn.mckinzie@leadpublicschools.org</a></p> <p>Families are always welcome to call the front office and request a direct contact for teachers. The front office phone number is (615) 806-6317</p>	
Administrator Contacts	<p>Principal: Kathryn McKinzie</p> <ul style="list-style-type: none"> <li>● Email: <a href="mailto:kathryn.mckinzie@leadpublicschools.org">kathryn.mckinzie@leadpublicschools.org</a></li> <li>● Phone: 225-721-2011</li> </ul> <p>Assistant Principal of Students: Jauriustee Brooks</p> <ul style="list-style-type: none"> <li>● Email: <a href="mailto:jauriustee.brooks@leadpublicschools.org">jauriustee.brooks@leadpublicschools.org</a></li> <li>● Phone: 615-543-8650</li> </ul> <p>Assistant Principal of Instruction: Lemuel Holifield</p> <ul style="list-style-type: none"> <li>● Email: <a href="mailto:Lemuel.holifield@leadpublicschools.org">Lemuel.holifield@leadpublicschools.org</a></li> <li>● Phone: 615-808-1091</li> </ul> <p>Assistant Principal of Instruction: Deirdra Smith</p> <ul style="list-style-type: none"> <li>● Email: <a href="mailto:deirdra.smith@leadpublicschools.org">deirdra.smith@leadpublicschools.org</a></li> <li>● Phone: 917-622-7304</li> </ul>	



**PARENT/STUDENT SIGNATURE PAGE**  
**LEAD Brick Church**  
**2022-2023**

Dear Students and Parent(s)/Guardian(s):

This handbook was developed as a guide for students and parents and to answer commonly asked questions that come up during the course of a school year. Our goal is to create a positive educational atmosphere of learning where rules are enforced firmly, fairly, and consistently to all students.

We ask that you familiarize yourself with this handbook by reading it and ask that you sign this page as evidence that you are aware of our policies and procedures. This form is part of the student registration process at LEAD Brick Church and must be returned as a condition of enrollment.

Signing below is evidence that parents and students have or will read and understand the contents of this handbook. It also grants permission for school photographs or videotapes to be used in media presentations that are made available to other educational institutions or through a cable television station or network. Parents understand that their child's image, name, work product, school, and grade may be revealed in the presentation(s) but that no other information about their child or his/her schoolwork will be revealed without prior consent.

\_\_\_\_\_  
Signature of Parent/Guardian

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Student

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name of Student

\_\_\_\_\_  
Grade of Student

B. Student Discipline Policy

LEAD Public Schools						
Discipline Codes						
Behavior	Code	Definition	Response	Middle (Grades 6-8) and High (Grades 9-12) OSS	Middle (Grades 6-8) and High (Grades 9-12) Expulsion	Elementary (Grades K-5) OSS
<b>Type 1 Behaviors</b>						
Tardy to School, Bus or Class	100	Arriving late to school, bus, class or activity.	<a href="#">A</a>	No	No	No
Noncompliance With a Reasonable Request	102	Not following the reasonable request of a teacher, administrator or staff member.	<a href="#">A</a>	No	No	No
Agitating Other Students	103	Unwanted and/or unreciprocated picking on or bothering of other students.	<a href="#">A</a>	No	No	No
Profane or Indecent Language	104	Using profane or indecent language, such as cursing. If directed at teacher, staff member or administrator, see Code 301.	<a href="#">A</a>	No	No	No
Possession of Fireworks	106	Knowingly possessing fireworks. Fireworks will be confiscated and not returned.	<a href="#">A</a>	No	No	No
Dress Code Violation	107	Wearing clothing that does not comply with the school's Standard School Attire policy or requirements for appropriate dress.	<a href="#">A</a>	No	No	No
<b>Type 2 Behaviors</b>						

<p>Repeated Violations of a Pattern of Same Type 1 Behaviors, With Evidence of Implemented Interventions</p>	<p>200</p>	<p>Repeated Violations of a Pattern of Same Type 1 Code (minimum of 3 within one quarter). Must be evidence of multiple implemented interventions. Interventions must be documented in the referral and in Support and Intervention (S &amp; I).</p> <p>Schools are to use RPA's Peace Centers, Advocacy Centers, (Tier 2 behavior plan, collaborative referral, behavior contract, restorative consequence, etc.) to address behavior concerns</p>	<p><a href="#">A, B, T</a></p>	<p>No</p>	<p>No</p>	<p>No</p>
<p>Possession of Tobacco Products</p>	<p>202</p>	<p>Possessing any tobacco products, including but not limited to, cigarettes, cigars, vapor or e-cigarettes, or chewing tobacco. All items will be confiscated and not returned. Students under 18 will be issued a citation.</p>	<p><a href="#">A, B</a></p>	<p>No</p>	<p>No</p>	<p>No</p>

Electronic Devices	203	<p>Using a cell phone, electronic device, or the internet for non-educational purposes or without the permission of the classroom teacher or school administrator.</p> <p>A teacher may withhold a student's phone from the student for the duration of the instructional time if the student's phone is a distraction to the class or the student.</p> <p>-TCA Title 49, Chapter 2 and Title 49, Chapter 6.</p>	<a href="#">A, B</a>	No	No	No
Disruption of Classroom	204	Continuously and intentionally disrupting the classroom learning environment to the extent that the learning of other students or the routine functioning of the class is significantly impaired. The discipline referral must describe the significant impairment to the learning or routine functioning of the class.	<a href="#">A, B</a>	No	No	No
Gambling	208	Betting on games or activities for money or things of value.	<a href="#">A, B</a>	No	No	No

Drug Paraphernalia	210	Possessing any material used to produce or consume illegal drugs. Drug paraphernalia includes, but is not limited to, bongs, roach clips, miniature spoons and pipes used to consume illegal drugs. All items will be confiscated and not returned.	<a href="#">A, B</a>	No	No	No
Cutting Class	211	While on school property, failing to attend a scheduled class or activity without authorization. If student is not attending any classes while in the building for the entire school day for five days, truancy protocol should be triggered.	<a href="#">A, B</a>	No	No	No
Inappropriate Physical Contact With Other Students	212	Engaging in unwanted minor physical contact with another student such as pushing, bumping or touching.	<a href="#">A, B, T</a>	No	No	No
<b>Type 3 Behaviors</b>						

Repeated Violations of a Pattern of Same Type 2 Behaviors, With Evidence of Implemented Interventions	300	<p>Repeated Violations of a Pattern of Same Type 2 Code (minimum of 3 within one quarter). Must be evidence of multiple implemented interventions. Interventions must be documented in the referral and in Support and Intervention.</p> <p>Schools are to use Restorative Practices Assistant's Peace Centers, Advocacy Centers, (Tier 2 behavior plan, collaborative referral, behavior contract, restorative consequence, etc.) to address behavior concerns.</p>	<a href="#">B, C, T</a>	Yes	No	No
Profane or Indecent Language Towards Teacher or Staff	301	Directing profane or indecent language toward a teacher, staff member or administrator.	<a href="#">B, C, T</a>	Yes	No	Yes
Leaving School Grounds or Bus Without Authorization	302	Leaving school grounds without the permission of school officials. Exiting the bus at an unauthorized stop or jumping from exit doors or windows.	<a href="#">B, C, T</a>	Yes	No	No
Noncompliance With an Administrative Directive or an Assigned Disciplinary Response	303	Repeatedly refusing to follow an administrative directive or to comply with an assigned disciplinary response. Repeated could be defined as repeated defiance happening in one event or multiple incidents over a period of time.	<a href="#">B, C</a>	Yes	No	No

Vandalism Under \$1000	304	Willfully destroying or defacing school or personal property. The damage caused is less than \$1000. A child's willingness to repair property damaged or to make restitution will be taken into account in determining appropriate level of response.	<a href="#">B, C, T</a>	Yes	No	No
Theft Under \$1000	305	Taking the property of another individual or the school without permission, with the intent of depriving the owner of the property. The value of the property taken is under \$1000. A child's willingness to return or replace item taken or make restitution will be taken into account in determining the appropriate level of response.	<a href="#">B, C, T</a>	Yes	No	No
Falsifying School Records	306	Falsifying or altering school records, including, but not limited to, written, electronic or digital school records. This does not include cheating.	<a href="#">B, C</a>	Yes	No	No

Inappropriate Sexual Behavior	307	Engaging in mutual activity of a sexual nature that does not meet the criteria of harassment or sexual assault. First offense for sexual intercourse should range between 1-3 days of OSS including a Restorative Conference with guardians upon returning to school.  *A referral to DCS will be made. Elementary OSS may only be used to allow time to create a safety plan to meet the needs of the students involved.	<a href="#">B, C, D, T</a>	Yes	No	Yes*
Indecent Exposure	308	Intentionally exposing body parts generally considered private. For shirts exposing cleavage, use Code 107 (Dress Code).	<a href="#">B, C, T</a>	Yes	No	No
Offensive Touching	309	Engaging in unwanted or offensive touching of areas generally considered private.	<a href="#">B, C, T</a>	Yes	No	No
Fighting	311	Mutual participation in an incident involving physical violence.  *Elementary students may only receive OSS if fight results in injury.	<a href="#">B, C, D, T</a>	Yes	No	Yes*
Alcohol or Drug-Like Substance: Use or Possession, Under the Influence	312	Possessing, using or being under the influence of substances that have the potential to intoxicate. A collaborative referral may be required. Students violating this code are not eligible for First Time Drug Offender Program.	<a href="#">B, C, T</a>	Yes	No	No



Threats, Class 1	313	<p>A threat to cause harm to students, staff or school in which no plan exists to carry out the threat. The threat must be one that would cause a person to reasonably fear bodily injury.</p> <p>A Building Level Threat Assessment must be completed.</p>	<a href="#">B, C, T</a>	Yes	No	No
Possession of a Non-Lethal Weapon or Replica of a Lethal Weapon	314	<p>Possessing a non-lethal weapon, including but not limited to weapon replica, stun gun, BB gun, air gun, air soft gun, pellet gun, cap gun, Orbitz gun, realistic toy gun, etc. Water guns are excluded, but not encouraged to have on school campus.</p>	<a href="#">B, C, T</a>	Yes	No	No

<p>Inappropriate Use of Electronic Devices</p>	<p>315</p>	<p>Viewing or distribution of sexually explicit images/videos and/or fights (i.e., air drop, social media post, etc.)</p> <p>If a student's rights are perceived to be violated, this may rise to the level of a Title IX investigation/incident. and standard Title IX procedures should be followed.</p> <p>A teacher may withhold a student's phone from the student for the duration of the instructional time if the student's phone is a distraction to the class or the student.</p> <p>-TCA Title 49, Chapter 2 and Title 49, Chapter 6</p>	<p><a href="#">B, C, T</a></p>			
<p>Possession of Other Weapons</p>	<p>317</p>	<p>Possessing an instrument capable of causing serious bodily injury, including but not limited to ammunition, knife, taser, and/or pepper spray. Weapons will be confiscated and turned over to the appropriate authorities.</p> <p>Use of taser and/or pepper spray may result in higher level codes (i.e. 413 – Extreme Disruption or 420 – Reckless Endangerment)</p>	<p><a href="#">B, C, D, T</a></p>	<p>Yes</p>	<p>No</p>	<p>No</p>

Trespassing on School Grounds	318	Entering and remaining on school property or during school-sponsored activities without authorization. Parents will be called. If student remains on campus, law enforcement may be contacted.	<a href="#">B, C</a>	Yes	No	No
Inappropriate Physical Contact Toward School Staff	319	Engaging in intentional physical contact with LEAD staff that does not rise to level of bodily injury.	<a href="#">B, C, T</a>	Yes	No	No
Gang Activity: Recruitment, Display or Possession of Symbols or Paraphernalia	320	Displaying gang symbols, gang paraphernalia or participating in the recruitment/initiation of a student into a gang (violent or disruptive group).	<a href="#">B, C, D, T</a>	Yes	No	No
Use of Tobacco Products	321	Using any tobacco products, including but not limited to, cigarettes, cigars, vapor or e-cigarettes, or chewing tobacco. For the first offense, a B response will be used. All items will be confiscated and not returned. Students under 18 will be issued a citation.	<a href="#">B, C, D, T</a>	Yes	No	No
<b>Type 4 Behaviors</b>						
Harassment of School Staff	400	Repeated incidents of intentional verbal, electronic, sexual, or physical harassment or intimidation directed at teachers, administrators or school staff. Documentation of incidents must be included in referral.	<a href="#">C, D, E</a>	Yes	Yes	No

Assault of a Student	401	<p>Intentionally, knowingly or recklessly committing an unprovoked physical attack on another student. Minor physical contact, such as pushing or shoving, does not constitute assault. Students may not receive the same disciplinary consequence for their involvement in an altercation if the school administrator determines they acted in self-defense to protect themselves from physical harm (TCA 49-6-3401).</p> <p>Response E may be used if the assault or the resulting injuries are severe. When response E is used, evidence documenting the incident's severity and any resulting injuries must be included in the discipline referral.</p>	<a href="#">D, E</a>	Yes	Yes	Yes
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Under the Influence of Illegal Drugs	402	<p>Being under the influence of any illegal drug(s) while on school grounds or at school-sponsored activities.</p> <p>1st offense: Mandatory collaborative referral for substance abuse will be made for any student found in violation of this code and up to 3 days suspension for middle and high school; up to 1-2 days suspension for elementary school.</p> <p>2nd offense: Required to attend First Time Drug Offenders Program (FTDOP) or Counseling and up to 5 days suspension for middle and high school; up to 1-2 days suspension for elementary. If a student does not attend, the student is expelled.</p> <p>3rd offense: Level E response option</p>	<a href="#">C, D, E</a>	Yes	Yes	No
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Threats, Class 2	403	<p>A threat to cause harm to students, staff or school. The threat must be verbal or written and include a detailed plan. Evidence must support that the threat is actually or potentially harmful or lethal to the safety of other students in the student's school as determined by the results of a Building Level threat assessment. The Building Level Threat Assessment must be completed within 24 school-day hours from when school administrators are made aware and the student returns to school. A District Level Threat Assessment can be conducted with approval from the Chief Officer of Student Services.</p> <p>In determining whether an E response should be used, a threat assessment must be conducted to determine whether the threat is credible.</p>	<a href="#">D, E</a>	Yes	Yes	No
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Threats by Electronic Transmission	404	<p>A student who transmits, by an electronic device, a credible threat to cause bodily injury or death to another student or school employee and creates actual disruptive activity at the school that requires administrative intervention. The Building Level Threat Assessment must be completed within 24 school-day hours from when school administrator is made aware and the student returns to school. A District Level Threat Assessment can be conducted with approval from the Chief of Student Services.</p>	<a href="#">D, E</a>	Yes	Yes	No
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Bullying	405	<p>Any intentional act that is severe, persistent or pervasive and substantially interferes with a student's educational benefits, opportunities or performance, and has the effect of:</p> <p>Physically harming a student or damaging a student's property</p> <p>Knowingly placing a student(s) in reasonable fear of physical harm or damage to the student's property</p> <p>Causing emotional distress to a student(s)</p> <p>Creating a hostile educational environment</p> <p>Bullying incidents must be reviewed for civil rights violations. If bullying is repeated over time and persists after documented administrative intervention, expulsion may result.</p> <p>*Elementary student OSS only if repeated over time and persists after documented administrative intervention.</p> <p>Hazing is an intentional or reckless act on or off LEAD property, by one student acting alone or with others, directed against any other student, that endangers the mental or physical health or safety of that student, or that induces or coerces a student to endanger that student's mental or physical health or safety. Hazing does not include physical contact associated with athletic events, training or</p>	<a href="#">C, D, E</a>	Yes	Yes	Yes*
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Cyberbullying	406	Using technology, including, but not limited to email, cell phones, voicemails, texts, photos, video messages, instant messaging, defamatory websites, social networking sites, online personal polling sites or journals to bully another student. See the definition of bullying above.  *Elementary OSS only if repeated over time and persists after documented administrative intervention.	<a href="#">C, D, E</a>	Yes	Yes	Yes*
<b>About Harassment:</b>		Based on a student's real or perceived race, color, religion, national origin, disability or ancestry. Harassment is misconduct that: 1) May be perceived or described as bullying, hazing, or cyberbullying, discrimination or intimidation 2) Is based on a student's real or perceived race, color, religion, national origin, disability, or ancestry, and 3) Creates a hostile environment when the conduct is sufficiently severe, pervasive or persistent to interfere or limit a student's ability to participate in school services, activities, or opportunities. Harassment does not have to include intent to harm, be directed at a specific target, or involve repeated incidents. Includes codes: 407, 408, 409. *Elementary OSS only if repeated over time and persists after documented administrative intervention.				
Harassment Based on Race, Color or National Origin	407	See definition above.	<a href="#">C, D, E</a>	Yes	Yes	Yes*
Harassment Based on Religion or Creed	408	See definition above.	<a href="#">C, D, E</a>	Yes	Yes	Yes*
Harassment Based on Gender, Gender-Identity or Sexual Orientation	409	See definition above.	<a href="#">C, D, E</a>	Yes	Yes	Yes*
Harassment Based on Disability	410	See definition above.	<a href="#">C, D, E</a>	Yes	Yes	Yes*

Sexual Harassment	411	See definition above. This code should not be used outside of the formal investigation process. Contact your Executive Director and Deputy Title IX Coordinator and Civil Rights Compliance Officer prior to issuing any discipline consequence (including the two- day summary suspension option).	<a href="#">C, D, E</a>	Yes	Yes	Yes*
Assault of a Teacher or Staff	412	Any act, intentional or unintentional, that causes or has the potential to cause physical injury to a teacher or school staff. An assault is more than incidental contact. Pushing or bumping a bus driver while the bus is operating constitutes assault of staff.	<a href="#">D, E</a>	Yes	Yes	Yes

Extreme Disruption of the School Environment or Bus	413	<p>Disrupting the school environment or bus to the extent that the safety of other students is at risk. The discipline referral must include evidence of actual disruption and actual risk of harm. Starting a fire or igniting fireworks constitutes extreme disruption. Using technology to access and alter student records or electronically tampering with LEAD technology systems and services (including but not limited to electronic records, databases, networks, and cloud services) in a manner that impairs normal school functioning constitutes extreme disruption.</p> <p>*Elementary administrators should use crisis response team.</p>	<a href="#">C, D, E</a>	Yes	Yes	No*
Group Fighting	414	<p>Three or more students engaging in a physical altercation. The altercation may include more students against a few students or multiple one on one fights.</p> <p>*Elementary students may only receive OSS if the fight results in injury.</p>	<a href="#">D, E</a>	Yes	Yes	Yes*

Repeated Violations	415	Repeated Violations of a Pattern of Same Type 3 Code (minimum of 3 within one quarter). Must be evidence of multiple implemented interventions. Interventions must be documented in the referral and in Support and Intervention.	<a href="#">C, D, E</a>	Yes	Yes	Yes
Gang Intimidation	416	A gang-involved student behaving in a way that would reasonably be expected to cause physical injury to any person. Evidence must be provided in the referral showing that a student is gang-involved and intimidation is gang-related.	<a href="#">C, D, E</a>	Yes	Yes	No

<p>Off Campus Behavior: For a felony charge under T.C.A 49-6-3051(b) OR An act committed against a member of the student's school community that poses a threat to the safety of the school</p>	<p>417</p>	<p>Students may be subject to disciplinary action for off-campus behavior when: The student's behavior results in a felony charge under T.C.A. 49-6-3051(b): murder, rape, aggravated robbery, kidnapping, aggravated assault, felony reckless endangerment and aggravated sexual battery and the student poses a threat to the safety of other students or staff.</p> <p>When a student commits an act against a member of the student's school community that poses a threat to the safety of other students or school staff in the student's school as determined by the results of a Building Level Threat Assessment. The referral must include a specific description of the safety threat posed to students or staff.</p>	<p><a href="#">C, D, E</a></p>	<p>Yes</p>	<p>Yes</p>	<p>No</p>
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Sexual Assault	418	<p>Unwanted sexual contact with the use of force against a person's will or when the victim is unable to give consent that poses physical, emotional or psychological distress or injury upon the victim.</p> <p>This code should not be used outside of the formal investigation process. Contact your Executive Director and Deputy Title IX Coordinator and Civil Rights Compliance Officer prior to issuing any discipline consequence (including the two- day summary suspension option).</p>	<a href="#">D, E</a>	Yes	Yes	Yes
Robbery	419	<p>Intentionally or knowingly taking the property of another person by use of violence or with the use of a weapon.</p>	<a href="#">D, E</a>	Yes	Yes	Yes
Reckless Endangerment	420	<p>A reckless action in which the behavior causes serious injury or may potentially cause serious injury. The potential harm must be foreseeable by a reasonable person.</p> <p>* Elementary students may receive up to two days OSS for safety planning purposes only.</p>	<a href="#">D, E</a>	Yes	Yes	Yes*

Fighting: Repeated	421	A middle or high school student who participates in three or more fights during the current year is subject to a five day suspension, or expulsion as determined by the executive principal. An elementary student may receive OSS for up to two days for three fights and five days for a fourth fight.	<a href="#">D, E</a>	Yes	Yes	Yes*
Vandalism Over \$1000	423	Willfully destroying or defacing school or personal property. The damage caused is over \$1000. A child's willingness to repair the damage or make restitution will be taken into account in determining the appropriate level of response.	<a href="#">D, E</a>	Yes	Yes	No
Theft Over \$1000	424	Taking the property of another individual or of the school without permission with the intent of depriving the owner of the property. The value of the property is over \$1000. A child's willingness to return or replace an item taken or make restitution will be taken into account in determining the appropriate level of response.	<a href="#">D, E</a>	Yes	Yes	No

Refusing or Fleeing Drug or Weapon Search	425	A student who refuses to submit to a drug or weapon search when requested is in violation of this code. Reasonable suspicion of drugs or firearms must exist for expulsion. A student violating this code is not eligible for the First Time Drug Offenders Program.	<a href="#">C, D, E</a>	Yes	Yes	
<b>Type 5 and ZT Behaviors</b>						
<b>About Zero Tolerance Offenses:</b>		A Zero Tolerance (ZT) Offense requires an expulsion of not less than one calendar year (180 school days) under Tennessee State Law. However, the director of schools or the designee may modify the length of the expulsion on a case-by-case basis through the appeals process or through a request for modification. The following are Zero Tolerance offenses under Tennessee Law.				
Rape	501	Committing oral, anal or vaginal penetration with use of force, against a person's will or when the victim is unable to give consent.	<a href="#">E</a>	Yes	Yes	Yes*
Attempted Homicide	502	Attempting to kill another person.	<a href="#">E</a>	Yes	Yes	Yes*
Homicide	503	Killing another person.	<a href="#">E</a>	Yes	Yes	Yes*



Drugs	505 (ZT)	<p>Unlawful possession, use or distribution of drugs on school grounds, including any controlled substance or legend drug (prescription drug). Distribution of drugs is defined as the intentional transfer of any prohibited drug for money or other benefit.</p> <p>A collaborative referral for substance abuse will be made for any student found in violation of this code.</p> <p>If it is the student's first offense under unlawful possession and use, not distribution, of drugs, the student qualifies for the First Time Drug Offender program.</p> <p>After completion of the 1st Time Drug Offender program, a 30-day follow up with parent and student to determine what additional services were offered and whether the student/parent participated/completed the services/support provided.</p> <p>Per LEAD Policy distribution based on possession constitutes the following:  Possession of 1 or more ounces of any controlled substance and/or legend drug (prescription).</p> <p>Possession of 3 or more vapes containing an controlled substance.</p>	<u>E</u>	Yes	Yes	Yes
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Aggravated Assault of Teacher, School Staff or a School Resource Officer (SRO)	506 (ZT)	Intentionally or knowingly Causing serious bodily injury or Committing an assault with a deadly weapon of a teacher, school staff, or SRO. "Serious bodily injury" is injury that requires more than basic first aid. A "deadly weapon" is a weapon, such as a firearm or knife, that is designed to inflict serious bodily injury.	<u>E</u>	Yes	Yes	Yes
Explosives	507 (ZT)	Possession of any destructive device, which includes any explosive, incendiary device or poison gas, including bombs, grenades, rockets, missiles, mines and similar devices. Possession of fireworks altered or modified to constitute an explosive may be considered a Zero Tolerance offense only if the altered fireworks are identified as an explosive by law enforcement officials. Fireworks are not considered an explosive.	<u>E</u>	Yes	Yes	Yes
Firearm	508 (ZT)	Possession of a firearm or bringing a firearm to school. This includes, but is not limited to, handguns, rifles and shotguns. As required by state and federal law, any student who brings a weapon to school will be referred to law enforcement.	<u>E</u>	Yes	Yes	



## **Student Discipline Hearing Procedures**

### **A. SUSPENSION PROCEDURES**

“Suspension” is defined as dismissal from attendance at school for any reason not exceeding ten (10) consecutive days. Multiple suspensions shall not run consecutively nor shall multiple suspensions be applied to avoid expulsion from school.

#### **1. Suspension of Ten Days or Less**

1.1 During the investigative process, a student will be afforded due process (the opportunity to give his/her written and verbal account of the incident). After the investigation, if a suspension is warranted, a suspension notice will be issued. A summary suspension of no more than two days may be given while completing an investigation.

1.2 If a student’s presence in the school poses any real or potential danger to other students or school officials, or a continual interruption of student education, the student will be removed from the school immediately. In this case, parent notification and due process will follow as soon as possible.

1.3 If appropriate, incidents may be referred to local law enforcement officials.

1.4 All information pertaining to the behavior incident should be entered in Power School including the date of the incident, primary student, witness and/or victims, appropriate event/discipline codes, incident details, action start and end dates, responsible person (principal or designee assigning action), and action details. The action of Out of School Suspension should be entered. Do not enter the action of Suspended.

1.5 Upon suspension of any student other than for in-school suspension of one (1) day or less, the principal shall, within twenty-four (24) hours, notify the parent or guardian. Principal or principal designee should verify with parent/guardian the student mailing address. The Notice of Disciplinary Action Report should be mailed the same day as the incident is addressed. A copy of this report should be placed in the student’s discipline file, which is separate from the cumulative record [TCA 49-6-4106 Disciplinary Referrals, Acts 2009, ch. 315, § 1.] Principal shall within twenty-four (24) hours notify the head of schools or the head of schools’ designee of the above suspension.

1.6 If the suspension is for more than five (5) days, the principal shall develop and implement a plan for improving the behavior.

1.7 In the event the suspension occurs during the last ten (10) days of any term or semester, the pupil may be permitted to take final examinations or submit required work that is necessary to complete the course of instruction for that semester, subject to the action of the principal, or the final action of the board of education upon any appeal from an order of a principal continuing a suspension. [TCA 49-6-3401 (d)]

## 2. Expulsions/Remandments

For Disciplinary Purposes: “Expelled” means removal from the student's regular school program at the location where the violation occurred or removal from school attendance altogether, as determined by the school official. [TCA49-6-3401 (g)(5)(A)]

“Expulsion” is defined as removal from attendance at school for more than ten (10) consecutive days or more than fifteen (15) days in a month of school attendance. Multiple suspensions that occur consecutively shall constitute expulsions. The school district shall not be eligible to receive funding for an expelled student. [TCA 49-6-3007 (h) (1)].

“Remand” is defined as assignment to alternative school. The student so assigned shall be included in ADA/ADM and will continue to be counted as present for funding purposes. The state department of education shall establish a set of codes to be used for reporting reasons for students on remand to an alternative school. [TCA 49-6-3007 (h) (2)].

2.1 All Notices of Expulsion shall be signed and approved by the Principal of the school.

2.2 School administrators will immediately notify the Director of Student Support of a student expulsion or remandment of more than ten days and the cause and conditions for readmission within 24 hours. If the student has an IEP, school administration will also immediately notify the Director of Exceptional Education. The following forms should be immediately faxed:

1. Discipline Response Form
2. Discipline Office Expulsion Referral Form
3. Notice of Expulsion of More than Ten (10) Days
4. Notice of Disciplinary Action
5. Notice of Expulsion and Right to Appeal
6. Exceptional Education Checklist

2.3 No later than the third (3rd) day of expulsion/remandment, the additional items below should be faxed to the Head of Schools:

1. Principal's, Student's, and all Witness Statement

2. Student's Report Card
3. Student's Transcript
4. Student's Schedule
5. Current IEP for Exceptional Ed Students
6. Manifestation Determination papers for Exceptional Ed Students

2.4 All information pertaining to the behavior incident should be entered in Power School including the date of the incident, primary student, witness and/or victims, appropriate event/discipline codes, incident details, action start and end dates, responsible person (principal or designee assigning action), and action details. School should activate the expulsion indicator in Power School and remove student schedule.

The Incident should be recorded with the action of expelled for high school, until the time a student enrolls in an Alternative Learning Center (ALC). Once a student has enrolled in the ALC, the expelled action should be deleted from the incident and the action of remandment should be added to the incident. Expelled students should not be withdrawn as dropouts from the home school.

2.5 Upon expulsion or remandment of any student the principal shall, within twenty-four (24) hours, notify the parent or guardian via written or actual notice. Principal or principal designee should verify with parent/guardian the student mailing address. The Notice of Disciplinary Action Report should be mailed the same day as the incident is reported and action is determined. Notice may be hand delivered. The right to appeal should be included with this notice. A copy of this report should be placed in the student's discipline file, which is separate from the cumulative record [TCA 49-6-4106 Disciplinary Referrals, Acts 2009, ch. 315, § 1.]



## Zero Tolerance

A Zero Tolerance (ZT) Offense requires an expulsion of not less than one calendar year (180 school days) under Tennessee State Law. The following are Zero Tolerance offenses:

- Bringing to school or being in unauthorized possession on school property of a firearm
  - This includes, but is not limited to, handguns, rifles and shotguns. As required by state and federal law, any student who brings a weapon to school will be referred to law enforcement.
- Commission of aggravated assault upon any teacher, principal, administrator, any other employee of an LEA, or school resource officer.
  - "Serious bodily injury" is an injury that requires more than basic first aid. A "deadly weapon" is a weapon, such as a firearm or knife, that is designed to inflict serious bodily injury.
- Unlawfully possessing any drug including any controlled substance.
  - Distribution of drugs is defined as the intentional transfer of any prohibited drug for money or other benefit. A collaborative referral for substance abuse will be made for any student found in violation of this code.
  - Distribution based on possession constitutes the following:
    - Possession of 1 or more ounces of any controlled substance and/or legend drug (prescription).
    - Possession of 3 or more vapes containing a controlled substance.
- Possession of any destructive device, which includes any explosive, incendiary device or poison gas, including bombs, grenades, rockets, missiles, mines and similar devices. Possession of fireworks altered or modified to constitute an explosive may be considered a Zero Tolerance offense only if the altered fireworks are identified as an explosive by law enforcement officials. Fireworks are not considered an explosive.

**Modification and Appeals.** The Head of Schools shall have the ability to modify zero tolerance disciplinary actions on a case-by-case basis.

## C. Enrollment Policy



### **LEAD Brick Church Enrollment Policy: TN Charter Commission Authorized Schools**

**Enrollment Calendar** - Many of our families have students in multiple schools across Davidson County. To keep enrollment as simple as possible for our families, we choose to mirror the process and timeline of the MNPS Optional Schools process whenever possible, regardless of school authorization.

The Spring 2024 enrollment timeline will differ slightly due to the uncertainty of authorization until mid-January. To adjust for this timeline, we are taking the following into consideration:

**School Capacity**- To comply with the TN Charter Commission timeline, we would communicate our capacity to enroll in January as a part of our lottery process. Our enrollment capacity shall be posted at least 14 days prior to the beginning of the open enrollment period which would be Monday, January 29, 2024. In order to provide timely enrollment estimates to the Department of Education, the enrollment period and lottery will conclude by March 25, 2024.

**Application Platform**- For the 2023-2024 enrollment year, we launched SchoolMint as our preferred vendor for our Application and Lottery Management system. Our organization and Director of Enrollment have prior experience with SchoolMint and managing our enrollment process adhering to the compliance requirements of the Tennessee Public Charter Commission with our successful authorization of LEAD Neely's Bend. SchoolMint integrates with Powerschool, and we have enhanced our functionality by adding SchoolMint Connect which will enable us to centralize and integrate our lead generation and customer relationship management platforms.

**Application Template** - If approved by the Commission, and with the later start date, we will submit for approval an application template that we plan to utilize by Monday, January 29, 2024 for review (in future years, knowing that typically this is by January 20). This application will not discriminate on the basis of race, color, national origin, sex, disability, and age. Applications will be made available in the predominant languages of the Brick Church community which are English and Spanish. If we receive more applications than the planned capacity, LEAD Brick Church will conduct a lottery in accordance with Tennessee Code Annotated (T.C.A.) §49-13-113.



### Proposed Open Enrollment/Lottery Calendar

- **Monday, December 4 - Friday, December 8, 2023 - Re-Registration Process Announced**
  - All current LEAD Brick Church families will have the opportunity to re-enroll with LEAD Brick Church via our re-registration process. This process will be executed collaboratively with our Operations Team, and will be done utilizing our internal communications platforms (Possip, Deanslist, our closed Facebook Groups) and also through a paper process consistent with our past processes. We will complement these efforts with phone call outreach to ensure families are fully aware and informed of the process for re-registration.
- **January 22, 2024 - January 26, 2024 - LEAD Brick Church Re-Registration Process - Round 1**
- **January 26, 2024 - The TN Charter Commission approves or denies LEAD Brick Church Application.**
- **Monday, February 19, 2024: LEAD Brick Church Open Enrollment Application Launch**
  - This application will include all families interested in enrolling in LEAD Brick Church across Davidson County and also within our predefined enrollment zones for LEAD Brick Church.
- **Monday, February 26, 2023 - LEAD Brick Church Re-Registration Process - Round 2**
- **Friday, March 8, 2024: Open Enrollment Application Deadline (by 4:30 p.m.)** \*Parents return forms to the Front Office at LEAD Brick Church or a designated place by the Charter Commission. Applications received by this deadline will be part of the random selection process on Lottery Day. This deadline also includes all “continuation forms” for students moving from elementary to middle or middle to high school on an approved pathway. Applications received after Friday, March 8, 2024 will be placed at the end of the waitlist.
- **MNPS Spring Break - March 11-March 15, 2024**
- **Monday, March 25, 2024:** Open Enrollment Lottery Day Results Available.
- **Wednesday, March 27, 2024:** Open Enrollment Acceptance/Waitlist Letters Acceptance and waitlist letters will be communicated to parents on this date.
- **Friday, April 12, 2024:** Deadline to Return Open Enrollment/Lottery Acceptance Letters (by 4:30 p.m.) *\*The acceptance letter must be returned to the LEAD Brick Church Front Office or the designated area via the Open Enrollment application point of contact on or before this date. Parents may also accept online.*
- **Friday, May 10, 2024:** 2024-2025 Student Placement Verification will be communicated to

**\*Available** - Families may apply year-round to LEAD Brick Church through our Open Enrollment process and placement will be granted based on placement on the waitlist and enrollment capacity.

### Enrollment Procedures





### **LEAD Brick Church Open Enrollment/Lottery**

- All interested applicants must adhere to the stipulations as outlined by the TN Charter Commission and complete an application that will be considered based on the choice of the parent, legal guardian, or custodian. All eligible students who submit a timely application shall be enrolled in the school, unless the number of applications exceeds the capacity of the program, in which case enrollment preferences and a lottery shall be instituted pursuant to state law and State Board rules.
- If family members need support with their application, a member of our Family and Community Engagement Team will be able to assist you and your family with your application.
- All admission and enrollment policies of the authorized charter schools shall restrict discrimination for any reason prohibited by state and/or federal law.
  - **LEAD Brick Church will operate a lottery process that adheres to the qualifications as outlined by the TN Charter Commission** - LEAD will offer a calendar of activities that will ensure that participating families are able to make an informed decision about their enrollment decision as it relates to LEAD Brick Church being authorized by the Tennessee Public Charter Commission.
    - Upon successful completion of an application, families are offered a seat via the lottery based on the communicated allotment of available seats. Families are offered a seat and are given an allotted amount of time (designated by the TN Public Charter Commission) to accept the seat. If the seat is not accepted within the allotted time, the seat is then offered to the next person in the lottery or waitlist. Those applicants that missed their offered seat, are then required to submit a new application and are considered based on their spot on the waitlist.
    - The LEAD Public Schools team will communicate with families based on the offers made via the lottery process in compliance with the lottery process, and any geographical, sibling, intra-network, or staff preferences are granted based on predefined business rules established collaboratively with the Director of Enrollment and the TN Charter Commission.

### **Nondiscriminatory admission policies, pursuant to T.C.A. § 49-13-107;**

LEAD follows both district and state guidelines regarding student enrollment procedures. LEAD Public Schools are open to all students in Davidson County who meet the eligibility requirements under Tennessee law. LEAD Public Schools does not discriminate on the basis of sex, race, national origin, creed, age, marital status, or disability in its educational program, activities, or employment policies as required by Title VI and VII of the 1964 Civil Rights Act, Title IX of the 1972 Educational Amendments, Section 504 of the Federal Rehabilitation Act of 1973, and the Americans with Disabilities Act.

### **Articulation plans or agreements, pursuant to T.C.A. § 49-13-113;**

Currently, LEAD Brick Church has an established pathway to LEAD Academy High School. This preferential treatment means that upon successful completion of a pathway continuation form, applicants are granted a



seat to attend LEAD Academy High School. As the school transitions to the TN Charter Commission, we intend to pursue this continued agreement with MNPS.

At LEAD, as a part of our customer experience, we support all of our students with getting into a school of their choice. Should LEAD Brick Church students not be interested in attending LEAD Academy High School, our Family and Community Engagement Team will work closely with our campus counselors in supporting graduating 8th grade students with high school placement. Our 8th grade students through their high school placement work will work to identify their school of choice and the Family and Community Engagement Team will work closely with the family throughout the application process.

#### **Identification of any pre-admission activities for students or parents**

LEAD Brick Church does not require participation in any pre-admission activities for students and parents. However, we do encourage families and students to participate in a range of events to ensure a smooth transition to the LEAD Brick Church community. For example, both new and returning students are encouraged to attend orientation prior to the start of the school year. The purpose of orientation/open house is for families and students to update family and student information, receive information on new or changed school policies and expectations, school culture, as well as ask questions and address concerns prior to the start of school. Also, each new to LEAD family meets with a member of the LEAD Public Schools faculty and staff and completes a commitment to LEADership meeting to learn the expectations for attending a LEAD Public School.

#### **Policies and procedures for student waitlists, withdrawals, re-enrollment, and transfers.**

##### **Waitlist Management:**

- **Initial Funding Estimates** - At the conclusion of the application period and lottery process, if necessary, but no later than March 15th the charter school will notify the Commission of the following information in order for initial funding estimates to be calculated by the Department of Education:
  - Total enrollment projections for the upcoming school year;
  - Number of students with disabilities and the school system the student would otherwise be enrolled in (if known);
  - Number of at-risk students (defined as students who for Direct Certification, students in foster care, and homeless, runaway, and migrant students); and
  - Number of English Learners (if known).
- **Waitlists will be maintained based on communicated capacity.** Families are offered a seat via the lottery based on the communicated allotment of available seats. Families are offered a seat and are given an allotted amount of time (designated by the TN Charter Commission) to accept the seat. If the seat is not accepted within the allotted time, the seat is then offered to the next person in the lottery or waitlist. Those applicants that missed their offered seat, are then required to submit a new application and are considered based on their spot on the waitlist.



- The LEAD Public Schools team will communicate with families based on the offers made via the lottery process in compliance with the lottery process, and any geographical, sibling, intra-network, or staff preferences are granted based on predefined business rules established collaboratively with the Director of Enrollment and the TN Charter Commission.

**Registration Process** - As a part of the enrollment process, any student entering school for the first time must present:

- A birth certificate or officially acceptable evidence of date of birth at the time of registration;
- Evidence of state-required immunization.
- Any student enrolling for the first time in a US school, should provide evidence of a current physical examination dated within the last calendar year;
- **If a parent is unable to provide requested documentation:**
  - If a parent does not have or cannot obtain a birth certificate, it is within the charter school's discretion to determine which documents are acceptable as proof of birth.
  - A charter school cannot deny enrollment based on the inability to produce social security cards or numbers, health forms, birth certificates, or other information.
  - A charter school can only require immunization records for enrollment. Please see the McKinney-Vento section of the document for additional information regarding students who are homeless. 4 T.C.A. § 49-6-3008(b) 5 T.C.A. § 49-6-5001(c) 6 TRR/MS 0520-01-03-08(2)(a); T.C.A. § 49-6-5004(a) 7 T.C.A. § 49-3-5001, Charter Commission LEA Policy 6203 – Physical Examinations and Immunizations TENNESSEE PUBLIC CHARTER SCHOOL COMMISSION Enrollment Procedures 1006 Version: 7/1/2022 Page 3 of 15
    - No family should be sent home to collect additional documentation prior to enrolling the student, and if the charter school asks for this additional documentation, the school shall immediately state that no documentation will be used in relation to immigration status.
    - If a student does not have the required immunizations, the school shall work with the family to schedule an immediate appointment for the student to receive the required immunizations. Students may be exempt from immunization requirements due to medical or religious reasons. The school leader shall make the exemption determination and shall retain documentation of exemption from the parent/guardian.
- **Proof of residency:** The charter school will use all resources available to them to assist in determining if enrolled students reside in the jurisdiction of the charter school, including but not limited to proof of residency, utility bills, real estate records, and home visits. It is within the discretion of the charter school to determine which documents are acceptable as proof of residency.
  - **All student information must be complete and entered into the Commission's approved student information system by August 31 of each school year.** Students enrolled after the start of a new school year must be entered into the Commission's approved student information system by the charter school within one (1) business day of a student's enrollment in the charter school.



- **Withdrawal Process** - If the family of a student chooses to withdraw the student from the charter school, the school shall complete the following steps:
  - Have the parent(s)/guardian(s) complete the school's withdrawal document(s), indicating the reason(s) they are seeking withdrawal.
  - If possible, schedule a meeting with the student and parent(s)/guardian(s) to discuss the reason(s) for withdrawal and school options. The LEAD Brick Church Exit Interview Form is available upon request, but will be kept as a part of our withdrawal paperwork in the front office.
  - Update the student's enrollment information and reason for withdrawal in the Commission's student information system within one (1) business day of the student withdrawing; and
  - Provide the student's records when requested by the school or district in which the student will be enrolling
- **Record request**
  - Once a student enrolls in the charter school, the school shall immediately request the student's records from the student's previous school.
  - **Since we are located in Davidson County, the following process as outlined by the TN Charter Commission shall be used:**
    - **Contact the school from which the student is transferring to request a copy of the student's cumulative file, including the student's Individualized Education Program (IEP), behavior plans, or ILP and EL folder if applicable.** The charter school should clearly indicate on the records request that the requesting charter school is outside of the receiving school's district. Upon receiving a records request, the receiving school will send the student's records to the Metro Nashville Public Schools central records office, which will then forward an electronic version of the student's records to the requesting charter school.
    - **If the student's previous school is unresponsive or the student's records have not been received within three (3) weeks of a request,** then the charter school shall contact the Metro Nashville Public Schools central records office to request a copy of the student's records.
    - **If Metro Nashville Public Schools is unable to provide the student's records,** the charter school shall contact the Commission. When a student with an IEP enrolls in the charter school, the school is required to complete the IEP development process as soon as possible after the student's enrollment, even if the school is unable to obtain the student's cumulative records within 30 days.
    - **Commitment to LEADership Process** - Each new to LEAD family meets with a member of the LEAD Public Schools faculty and staff and completes a commitment to LEADership meeting to learn the expectations for attending a LEAD Public School.
- **Identification of English Learners/Enrolling Students with Disabilities/Identification of Homeless Students/Identification of Immigrant Children and Youth/Identification of Students in Foster Care/Identification of Migrant Students/Identification of Military-Connected Students** - LEAD



Neely's Bend will adhere to the Enrollment Policy # 1006 as outlined by the TN Charter Commission.

- **Re-Registration Process at LEAD Public Schools (Returning LEAD Families)**
  - Re-registration paperwork will be sent home with students who have current enrollment at LEAD and need to confirm a seat for the upcoming school year. These forms will be sent home annually by January 31<sup>st</sup>. Families are given one week to complete the form and return it to the Family and Community Engagement Coordinator. LEAD Public Schools enjoys working with all of our families and students and requires all families complete and return an intent to return form by the deadline provided.
  - **Re-registration Process** - This process is conducted by the Family and Community Engagement Team in collaboration with the campus team from December through March of every year and is meant for families to communicate their enrollment intentions for the following year. We have a standardized form that we utilize for each of our LEAD campuses, and will continue to use the same form with LEAD Brick Church if authorized through the TN Charter Commission. This form is available upon request.
  - **Census Verification Form Process** - As a part of our re-registration process, every returning LEAD student is required to submit an Enrollment/Census Verification form which provides updated family information for our Student Management System. This will be a process that we will continue as a part of our May Verification Process if we are authorized by the TN Charter Commission. We have a standardized form that we utilize for each of our LEAD campuses, and will continue to use the same form with LEAD Brick Church if authorized through the TN Charter Commission. This form is available upon request.
- **Intra-Network Transfers** - LEAD Public Schools students get preferential treatment when applying to transfer to another LEAD Public School. Transportation is not guaranteed, though preference is given for enrollment. In order to be considered, families must complete an application and contact their Family and Community Engagement Coordinator for next steps.
  - To request a transfer out, a family should complete and submit an application and meet with the sending school in order to ensure a smooth transfer.
  - Within a week of receiving the request, a member of the sending school will contact the receiving school to confirm availability, and also ensure that capacity and successful completion of all required paperwork.
  - A meeting with the family will be conducted to ensure that any concerns are heard and addressed, and that the family has been adequately informed of options. If the family affirms the decision to transfer or withdraw after the meeting, LEAD Brick Church will attempt to coordinate with the new school that the family indicates that they will be attending, to ensure a smooth transition. Additional processes may exist to ensure appropriate service for students with disabilities or other special needs. In the event that the receiving school cannot adequately serve a student's needs or there are extenuating safety, discipline, or medical issues, school leaders will work with the sending school to find a suitable administrative placement.

11/21/2023

Hello,

We started Lead Brick church fall of 2021. Coming from a school where all Kimber friend were to not knowing any one at Brick church. She was very nervous and scared. We came to open house right before school started and met principle, teachers and school activity coordinator. They talk to her, played games, advised her that they allow everyone to be them. They will help her with all her subjects even had extra help if needed. After we left, she was still a bit nervous.

Starting school August of 2021. I took her to school the first two weeks. After that time frame she wanted to ride the bus. Here I am nervous because she didn't know many people but she called these kids her friends and the teachers and staff was really nice and encouraged her that riding the bus with her friends would be ok. She started to ride the bus daily.

She started to have issues with

math witch is one of her worse subjects. She hated math and her teacher Ms. Eiger wasn't going to let her fall. She called, emailed, texted and sent home extra work to make sure Kimber was getting the concept of the work that was being taught.

Fast forward to 2022-2023 year for math her teacher is Ms Moore. Kimber still not confident in her work in math. But Ms Moore is making sure Kimber is being confident in her work and answer. She knows the work but second guess herself alot is what Ms. Moore and myself has noticed. She also text, call and email to make sure that I know there is work to be done and what she is having trouble with.

They aren't the only teachers that call or text. But specifically them because thats the subject that she has trouble with.

However the school has been a joy. Everybody is always so happy, bubbly, and kind. When you walk into the office



there is always some one to greet you with a smile on they face. When you call there is always someone to answer the phone that sound like they want to be there and not in bed sleep.

Brick church isn't just a school everybody is like family. Everybody has got to know everybody. Very comfortable with the kids, their parent etc.

Also as far a sports Kimber was shy and afraid to try out and play because she not a very confident person.

But the athletic team has helped her and pushed her into her second year of volleyball, basketball and hopefully track.

"No sports if the grades aren't where they need to be."

And the cheerleader that Ms Vaden & Ms. Dator don't play about my Niece Malaysia first year 2022-2023 5th grade.

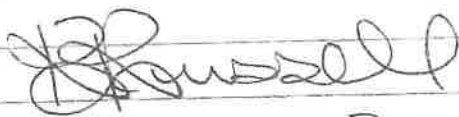
She wanted to cheer so bad but had no rythm (LOL), she ~~tried and~~ tried out for cheer<sup>and made it</sup> ON now happy she was.



Nevertheless, Kimber had suicidal thoughts that I knew nothing about. Before a break the school counselors called before break, during break and still all periodically. The staff really care about the students. They aren't just here for a check.

I have two kids here now and next year we would have a 3<sup>rd</sup> kid here. And she's super excited to get on the cheer and basketball team.

We are Kimberly and Eibrian Fields. The parents of Malaysia Russell (5<sup>th</sup>)<sup>first yr.</sup> Kimber Batts (7<sup>th</sup>)<sup>2<sup>nd</sup> yr.</sup> We feel that the contract should be renewed. The staff makes the parents feel at ease.



-Parent

To whom it may concern

I am in full support of LEAD Brick Church's Charter Application being approved with the Tennessee Public Charter School Commission for a renewal of 10 years! My daughter has nothing but great things to say about the staff of Brick Church. I believe the faculty goes above and beyond every day to pour into the students' lives, not just supervise them. The school offers awesome opportunities for the students that include academics, tutoring, competitive sports, fun electives, and ample opportunities to provide feedback. The school also provides frequent feedback on your students' progress, is great at communicating on upcoming events, field trips, opportunities for parents to be involved, and more! It is the passion of the faculty to see the students succeed that makes the difference 🙏.

Tara Morgan

Parent of Kennedy Russell

Time at LEAD Brick Church - Since 5th grade- 8th grade

To whom it may concern

My name is Jessica Carter, and my child's name is Charlie Borton. He currently attends LEAD Brick Church and this has been his first year attending this school. They have shown us how lucky we are to be able to be a part of the LEAD Brick Church family. It is my understanding based on communication that has been sent home by the school that we are in the process of applying for a new charter with the Tennessee Public Charter School Commission. I hope that you will consider LEAD Brick Church and renew them for an additional 10 years under your authorization. My reasons are as followed:

- They have helped my child grow in many ways and have shown him an ample amount of support with all his educational and behavioral needs.
- My child had an IEP in place and got taken off prior to starting at LEAD Brick Church, and it is simply amazing that they have been the only school to ever supply the support my child needs without the need of another IEP because they truly encourage him that they are there for him and teach in a way where all students are able to comprehend.
- They make sure they have time to actually teach the students and not just run through assignments before everybody has ways of understanding their school work.
- LEAD Brick Church is the kind of school the kids in today's world need, because they make sure the students are going to have the education and behavior they need to be able to lead the world one day.

LEAD Brick Church has done an amazing job of communicating with me as a parent, and helping my child be successful and ready for the future, it is for these reasons that I hope you all will allow LEAD to continue to not only serve my child, but also work with other families like mine. I believe they are that ray of hope that our society desperately needs helping us as parents prepare our children for the future. Thank you for your time, and please do not hesitate to reach out to me directly if you have any questions, my number is 615-491-6844, and again, thank you for your time.

Sincerely,

Jessica Carter / a very happy LEAD Brick Church Parent

To whom it may concern,

I'm writing this letter as a LEAD Brick Church parent. My name is Lemuel Holifield, I'm the father of two students who currently attend LEAD Brick Church. My oldest Lemuel Josiah is in the 7th and Nehemiah is in the 5th grade. I'm currently in my 14th year being an educator. I've had the honor of working with many amazing educators, and students in many different schools. LEAD Brick Church is unique in that every adult in the building has committed to show up as their best selves every day for our students. The staff at LEAD Brick Church are knowledgeable, welcoming, and great role models. My sons are surrounded by adults who will hold them to high academic standards while simultaneously ensuring their day is going well, or provide encouragement and motivation when needed.

Students not only receive a high quality middle school education while attending LEAD Brick Church, students also receive positive daily affirmations, guidance and mentoring. Students have the ability to participate in many activities such as sports, dance and male mentoring programs. During the school day LEAD Brick Church also allows students to attend clubs and CREW weekly. These are great opportunities for students to attempt different activities that they normally wouldn't have considered. One of those clubs is a bicycle building program. Students (with the assistance of a local bicycle non-profit) assemble bicycles over the course of 8 weeks, culminating in a ride around the school and the students are allowed to keep the bikes once completed.

I must note I'm in the second year of my position as Assistant Principal of Instruction at LEAD Brick Church. This is the first year of my son's attending LEAD Brick Church. By their admission, this year has been "amazing, and exciting every day." Granting the 10 year charter will allow all stakeholders to continue to build on the excellence that has become expected at LEAD Brick Church.

Thank you for your time and consideration.

- Lemuel Holifield

My name is Tameka Jones, and I am a student at LEAD Brick Church. I have attended LEAD Brick Church for 1 year and I have enjoyed my time here as a student for the following reasons

- We have lots of fun stuff going on every month
- The teachers are cool
- Field trips
- Events
- The learning environment is really good.

I am a member of the LEAD Brick Church student Ambassadors and as a member of this team, I feel that it is my responsibility to (what as a member of this team) my responsibility of being a student ambassador is being a leader and having good grades.

I hope that you will consider Lead Brick Church and renew our school for an additional 10 years under your authorization. It would really mean a lot to me and my class mates.

Thank you for your time, and please do not hesitate to reach out to me directly if you have any questions.

LEAD Brick Church Student Ambassador, Tameka Jones.

Marionne Brown

My name is Marionne, and I am a student at Lead Brick Church. I have attended Lead brick church for 2 years and I have enjoyed my time here as a student because of the teachers that are at this school. Another reason is because of the principal Ms. Rice, she has very high expectations for me and I really do like that.

Another reason I have enjoyed my time here is because of the activities and events. The events we have here are very fun to attend. Another reason I enjoy coming to this school is because of the learning environment. The learning environment at Lead Brick Church have high standards and is very fun.

I am a member of Lead Brick Church Ambassadors and as a member of this team, I feel my responsibility to do my work in class and be a good example to the class.

I hope that you will consider Lead Brick Church and renew our school for an additional 10 years under your authorization. It would really mean a lot to me and the other 8th graders.

Sincerely, Marionne

To whom it may concern,

My name is Dakhari, and I am a student here at Lead brick church. I have attended LBC for 1 1/2 years and I have enjoyed my time here as a student because of the welcoming and kind community, the peaceful atmosphere, the great learning environment, and the teachers that encourage students to do their best.

I am a member of LEAD Brick Church Student Ambassadors and as a members of this team, I feel that it is my responsibility to represent the student and force all 5 ethos, and present a welcoming atmosphere.

I hope that you will you will consider LEAD Brick church an renew our school for an additional 10 years under your your authoration. It would really mean alot to me and my classmates. Thank you for your time, and please do not hesitate to reach out to me directly if you have any questions.

Lead Brick Church Ambassador,

Dakhari Lindsley

To whom it may concern,

My name is Lashirleen Bihoriman, and I am a student at LEAD Brick Church. I have attended LEAD Brick Church for two and a half years and I have enjoyed my time here as a student because of the other students giving maximum effort, the learning environment, the extremely kind community, and the incentives.

I am a member of the LEAD Brick Church Student Ambassadors and as a member of this team, I feel that it is my responsibility to ensure and encourage positive student behavior and determination to represent all five ethos of this school.

I hope that you will consider LEAD Brick Church and renew our school for an additional 10 years under your authorization. It would really mean a lot to me and my classmates.

Thank you for your time, and please do not hesitate to reach out to me directly if you have any questions.

LEAD Brick Church Student Ambassador,





Juan 12/8/23  
Rios

Hey, my name is Juan C. Rios Garcia and I am a Lead Brick Church Student I have attended this school for 1 year and I have enjoyed my time here for this reasons.

The teachers here are enjoyable and help in a playful and cool ways, and you can easily make friends here a LBC, and the events they plan out are very good in my opinion.

I am a member of the LBC Student Ambassadors and as a member of this team I feel that it is my responsibility to help my class mate with stuff they don't understand and help around the school. Also my favorite teacher is Mr. Pillow because he is the math teacher and likes to have fun with different students, and I love math and its easyness.

This School is  
Great.

Juan C. Rios Garcia  
12/8/23 LBC Student  
LBC Student Ambassador

Demontca  
Johnson  
12-8-23

Demontca  
Demontca's name is Demontca and  
I am a student at Lead  
Brick Church. I have attended  
Lead Brick Church for 1 year  
and I have enjoyed my time  
here as a student and IBC  
is fun/feels like a home a  
home I can feel safe at.  
I am a member of Lead Brick  
Church Student Ambassador's is  
a member of this team;  
feel that it is my responsibility  
to show leadership and kindness  
to all my peers as a student  
ambassador. I hope that you  
will consider IBC and renew our  
school for an additional 10  
years under your <sup>supervision</sup> it  
would mean a lot to  
me and my classmates  
and thank you for your  
time Lead Brick Church  
Student Ambassador - Demontca Johnson

To whom it may concern

My name is Micah. H, and I'm a student at LEAD Brick Church. I have attend LBC for 1 year, and I have enjoyed my time here as a student for the following reasons: 1, The teachers here are great and funny people. 2, Breakfast and lunch are deliciously healthy. 3, The clubs here are chill and fun. And 4, I recieved m LBC water bottle from here. I am a member of the LBC Student Ambassadors and as a member of th team, I feel that it's my responsibility to assit studen with work they struggle to understand and to try my best to help them with confusing subjects. I hope tha you'll consider LBC and renew our school for an additional 10 years under your authorization. It'd really mean alot to me and my classmates.

Thank you for your time, and please don't hesitate to reach out to me directly if you have any questions

LBC Student Ambassador, Micah Harrison

To To Whom it may Concern  
My name is Fayo Saidati, and i am at  
LEAD Brick Church. I have attended  
lead brick Church for 4 years and i  
enjoyed my time here as a student  
because I have found friends i love.  
Here at LBC i have found amazing  
teachers, Lead brick Church has an  
really great learning environment, LBC  
also contains fun activities like ProP,  
Rallies, Games, LBC also has lots of  
fun events. I am a member of the  
LEAD Brick Church Student Ambassador  
and as a member of this team, I feel  
that it is my responsibility to have  
have other students experience the joy  
of LBC and to learn the excitement  
LBC has. I hope that you will consider  
Lead brick Church and renew our  
School for an additional 10 years  
under your authorization. It would  
mean alot to me and my classmates.

Lead brick Church Student Ambassador

Fayo Saidati



**BILL GARRETT, Davidson County**

Trans: T20120048143 CHARTER  
Recvd: 06/29/12 13:38 6 pgs  
Fees: 7.50 Taxes: 0.00



20120629-0057375

**STATE OF TENNESSEE**  
**Tre Hargett, Secretary of State**

Division of Business Services

William R. Snodgrass Tower  
312 Rosa L. Parks AVE, 6th FL  
Nashville, TN 37243-1102

Brick Church College Prep, Nonprofit LLC  
1704 HEIMAN ST  
NASHVILLE, TN 37208-2406

June 28, 2012

### Filing Acknowledgment

Please review the filing information below and notify our office immediately of any discrepancies.

<b>Control # :</b>	<b>689827</b>	Formation Locale:	TENNESSEE
Filing Type:	Limited Liability Company - Domestic	Date Formed:	06/28/2012
Filing Date:	06/28/2012 3:39 PM	Fiscal Year Close	12
Status:	Active	Annual Rpt Due:	04/01/2013
Duration Term:	Perpetual	Image # :	7071-0744
Business Type:	Non-Profit Limited Liability Company		
Managed By:	Member Managed		
Business County:	DAVIDSON COUNTY		

#### Document Receipt

Receipt # : 784307	Filing Fee:	\$300.00
Payment-Check/MO - SHERRARD & ROE, PLC, Nashville, TN		\$300.00

**Registered Agent Address:**  
Chris Reynolds  
1812 HAYES ST  
NASHVILLE, TN 37203-2504

**Principal Address:**  
1704 HEIMAN ST  
NASHVILLE, TN 37208-2406

Congratulations on the successful filing of your **Articles of Organization** for **Brick Church College Prep, Nonprofit LLC** in the State of Tennessee which is effective on the date shown above. You must also file this document in the office of the Register of Deeds in the county where the entity has its principal office if such principal office is in Tennessee.

You must file an Annual Report with this office on or before the Annual Report Due Date noted above and maintain a Registered Office and Registered Agent. Failure to do so will subject the business to Administrative Dissolution/Revocation.

Tre Hargett  
Secretary of State

Processed By: Kathy Sherrell



# TENNESSEE DEPARTMENT OF REVENUE

## Certificate of Exemption

**LEAD ACADEMY**  
**ATTN: LEAD ACADEMY**  
**1704 HEIMAN ST**  
**NASHVILLE TN 37208-2406**

June 7, 2011

Account Type: S&U EXEMPT

Account No.: 780210746

Under the provisions of T.C.A. Section 67-6-322, the organization named above is granted authority from the Tennessee Department of Revenue to make purchases, without payment of the Sales or Use Tax, of tangible personal property or taxable services to be used or consumed by the organization itself or to be given away.

The organization must furnish the suppliers of goods and services with a COPY of this exemption certificate. The lower portion of the certificate must be properly completed. The organization MUST retain the original certificate for copy purposes. The supplier will maintain a file copy as evidence of exemption. Later purchases do not require the submission of additional copies. Invoices must contain the name of the organization and the number given above.

This authority does not extend to purchases made by representatives of the organization when the items purchased or services rendered are paid for with personal funds. It does not extend to items purchased to be resold.

THE ORGANIZATION MUST NOTIFY THE DEPARTMENT IMMEDIATELY IF IT CEASES TO EXIST, MOVES, OR IN ANY WAY CHANGES THE ORGANIZATION FROM ITS PRESENT FORM.

**Richard H. Roberts**  
COMMISSIONER OF REVENUE

EFFECTIVE DATE July 1, 2011

TO BE COMPLETED BY THE ORGANIZATION (please print)

TO: SUPPLIER'S NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

I \_\_\_\_\_ as an authorized representative of the organization named above affirm that the purchases made under this authority will be used and consumed by the organization or will be given away. I further affirm that the organization will not use this authority to purchase items for resale.

Under penalty of perjury, I affirm this to be a true and correct statement.

PRINT NAME OF ORGANIZATION : \_\_\_\_\_

PRINT NAME OF PURCHASER: \_\_\_\_\_

SIGNATURE OF PURCHASER: \_\_\_\_\_



**AMENDED AND RESTATED**

**BY-LAWS**

**OF**

**LEAD PUBLIC SCHOOLS, INC.**

Adopted: October 1, 2019

**ARTICLE I.**

**IDENTIFICATION**

**Section 1. Name.** The name of the corporation shall be LEAD Public Schools, Inc. (the “Corporation”), which is formed exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the “Code”).

**Section 2. Offices.** The executive offices of the Corporation shall be in Davidson County, Tennessee, but the Corporation may have other offices at such places as the Board of Directors may from time to time decide or as the business of the Corporation may require.

**Section 3. Seal.** The corporation shall have no seal.

**Section 4. Fiscal Year.** The fiscal year of the Corporation shall begin on July 1 and end on June 30 of the next calendar year, but the Board of Directors may from time to time change the fiscal year of the Corporation.

**ARTICLE II.**

**OBJECTIVES AND PURPOSES**

The Corporation is organized exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the “Code”). Specifically, the Corporation shall, acting as a holding company, establish and operate, through wholly-owned subsidiaries, one or more Charter Schools in accordance with the Tennessee Public Charter Schools Act of 2002 (Tennessee Code Annotated § 49-13-101 et. seq.), as amended, restated or replaced from time to time (the “Charter Act”) and the requirements of the Metropolitan Board of Public Education for Nashville and Davidson County (the “Metro School Board”), the Tennessee Achievement School District (the “ASD”), and any future charter school authorizers (collectively, the “Charter Authorizers”). The Corporation is organized to engage in any activity, and to exercise any and all powers, rights and privileges, afforded a not-for-profit corporation under the Tennessee Nonprofit Corporation Act, as amended from time to time (the “Act”). The Corporation may engage in all activities proper under applicable law, provided such activities are not inconsistent with these



Act, the By-laws, the Charter Act, or the requirements of the Charter Authorizers. The managing of the business and regulation of Corporation affairs shall be consistent with these By-laws.

The Corporation is organized to engage in any activity, and to exercise any and all powers, rights and privileges, afforded a nonprofit corporation under the Act; provided, however, that the Corporation shall not carry on any other activities not permitted to be carried on by any of the following: (a) a corporation exempt from federal income tax under Section 501(c)(3) of the code, or any corresponding provision of any future federal tax laws; (b) a corporation to which contributions are deductible under Sections 170(c)(2), 2055(a), and 2522(a) of the Code, or any corresponding provisions of any future federal tax laws; or (c) a nonprofit corporation organized under the laws of the State of Tennessee pursuant to the Act or the Charter Act. The Corporation shall not discriminate with respect to admissions to its Charter School(s) on the basis of race, creed, color, national origin, religion, ancestry, or the need for special education services as set forth in the Charter Act. Further, the Corporation shall insure that its Charter School(s) is non-sectarian and non-religious in its curriculum, programs, admission policies, employment practices, governance, and all other operations.

### **ARTICLE III.**

#### **NO MEMBERS**

The Corporation shall not have members.

### **ARTICLE IV.**

#### **DIRECTOR/NOMINATING COMMITTEE**

A Director/Nominating Committee consisting of (i) the Chairman of the Board of Directors, and (ii) two additional Directors, who shall be nominated by the Chairman and approved by a majority vote of the Board of Directors, shall serve as the Nominating Committee of Directors for the Corporation. The Chief Executive Officer of the Corporation shall also serve as an *ex officio* member of the Director/Nominating Committee. At each Annual Meeting of the Board of Directors of the Corporation, the Director/Nominating Committee shall present the Board of Directors with a single slate of nominees for election to the Board of Directors, which slate of nominees shall be approved or disapproved by a Majority Vote (as defined in Article V Section 4) of the Board of Directors. In addition, the Director/Nominating Committee shall present the Board of Directors with a single slate of nominees for Officers of the Corporation, with such slate of Officers to be approved or disapproved by a Majority Vote of the Board of Directors. In each instance, the Director/Nominating Committee shall establish the slate of Directors and slate of Officers by a Majority Vote of the Committee.

### **ARTICLE V.**

#### **DIRECTORS**

**Section 1. General Powers; Number.** The business and affairs of the Corporation shall be managed and controlled by its Board of Directors, which shall exercise in the name of, and on behalf





of, the Corporation all of the rights and privileges legally exercisable by the Corporation as a corporate entity, except as may otherwise be provided by law, its Charter, these By-Laws, the Charter Law, or the requirements of the Charter Authorizers. There shall at all times be at least five (5), but not more than twenty (20) Directors. However, the number of Directors may be increased or decreased from time to time by amendment to these By-Laws.

**Section 2. Composition of the Board of Directors; Term.** The Board of Directors shall be composed of a minimum of five (5) Directors, and a maximum of twenty (20) Directors. Each Director shall serve a three-year term, with the term of approximately one-third of the Board to be scheduled to expire each year. Directors shall be entitled to serve two (2) consecutive three-year terms; and, after a lapse of at least one year, any Director shall be entitled to be reelected for an additional term(s) (subject to the limitation of two (2) consecutive terms). Directors will be elected at the Annual Meeting of the Corporation from a single slate presented by the Director/Nominating Committee. The Board of Directors shall be self-perpetuating. In addition to the elected Directors, the Chief Executive Officer of the Corporation shall also serve as an *ex officio*, but non-voting, member of the Board of Directors.

**Section 3. Meetings.** Regular meetings of the Board of Directors shall be held quarterly or upon call at any time by the Chairman of the Board, Chief Executive Officer or by any two (2) Directors on at least five (5) days' prior written notice forwarded to the entire Board by the Secretary of the Corporation. Notice of any such meeting may be waived by the person or persons entitled thereto by signing a written waiver of notice at any time before or after the meeting is completed. Attendance of a Director at a meeting shall constitute a waiver of notice thereof unless such attendance is for the express purpose of objecting to such meeting. Any meeting of the Board of Directors may be held within or without the State of Tennessee at such place as may be determined by the person or persons calling the meeting. Any Director may participate in a meeting of the Board of Directors (or of any committee of the Board of Directors) by means of conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear one another; and participation in a meeting pursuant to this provision shall constitute presence in person at such meeting.

**Section 4. Quorum; Voting.** A majority of the Directors then in office shall constitute a quorum for the transaction of business; and the vote or action of a majority of the Directors present at any meeting at which a quorum exists (a "Majority Vote") shall decide any matter that may come before the meeting and shall be the act of the Board unless otherwise specifically required by law or by express provision of the Charter or By-Laws of the Corporation. Directors absent from any meeting shall be permitted to vote at such meeting by written proxies. The CEO, as an *ex-officio* member of the Board, shall not be entitled to vote, nor shall his/her presence at a meeting count towards the calculation of a quorum.

**Section 5. Vacancies.** Vacancies in the Board of Directors occurring for any reason, including an increase in the number of Directors or the resignation or removal of any Director, may be filled by a Majority Vote of the Directors for a nominee proposed by the Director/Nominating Committee. A Director elected to fill any vacancy shall hold office for the remainder of the term of the Director that he or she is replacing.



**Section 6. Removal.** Upon an affirmative majority vote of the entire Board of Directors any Director may be removed from office, with or without cause.

**Section 7. Compensation.** Directors shall not receive any compensation for their services, but by resolution of the Board of Directors may be reimbursed for their expenses incurred in attending the meetings of the Board or in performing official functions of the Corporation.

**Section 8. Disqualification of a Director.** No person who has been convicted of a felony or other criminal offense involving dishonesty, fraud, or moral turpitude shall be elected as a Director of the Corporation; and any existing Director of the Corporation who is convicted of a felony or other criminal offense involving dishonesty, fraud, or moral turpitude shall automatically be removed from office, without the need for any further action by the Board of Directors.

**Section 9. Delegation of Operational Duties.** Notwithstanding the fact that the Board of Directors is responsible for the business and affairs of the Corporation, the Board of Directors is entitled to delegate the responsibility for the day-to-day operations of the Corporation's Charter School(s) to the Chief Executive Officer and Officers of the Corporation (or the Principal or Officers of any subsidiary of the Corporation), subject to the continuing oversight and direction of the Board.

## ARTICLE VI.

### OFFICERS

**Section 1. Designation.** The principal Officers of the Corporation shall be the Chairman of the Board, the Chief Executive Officer, a Secretary, a Treasurer and any other Officers deemed appropriate by the Board of Directors. Any two (2) or more of such offices may be held by the same person except the offices of Chief Executive Officer and Secretary.

**Section 2. Chairman of the Board.** The Chairman of the Board (also known as the "Chairman") shall preside at all meetings of the Board of Directors and shall act as the principal liaison between the Board and the Chief Executive Officer and other Officers. The Chairman shall serve as a member of the Director/Nominating Committee, with the additional responsibility of (i) nominating the other two Directors to serve on the Director/Nominating Committee (subject to Board approval), and (ii) presiding over each committee meeting of the Director/Nominating Committee. The Chairman shall be charged with the responsibility of appointing, with the assistance of the Chief Executive Officer, the members of each standing committee of the Board. The Chairman shall be entitled to serve on any standing committee of the Board. The Chairman shall have such other powers and perform such other duties as may be assigned by the Board.

**Section 3. Chief Executive Officer.** The Chief Executive Officer (also known as the "President") shall be the chief executive officer of the Corporation and shall exercise all the powers and duties customarily exercised by the chief executive officer of business corporations. He/She shall have general supervision of the business and property of the Corporation; and he/she may appoint agents and employees of the Corporation, other than the Officers elected or appointed by the Board, subject to the approval of the Board. The Chief Executive Officer shall be responsible for the day-to-



day operations of the Corporation's Charter School(s) with the ability to hire and fire all Charter School personnel. He/She shall perform such other duties as may from time to time be prescribed by the Board. The Chief Executive Officer shall be an *ex officio* member of the Board of Directors, as well as all standing committees of the Board. At each meeting of the Board of Directors, the Chief Executive Officer shall report on the operations of the Charter School(s).

**Section 4. Secretary.** The Secretary shall keep the minutes of all meetings of the Board of Directors in appropriate books and shall attend to the giving of all notices for the Corporation. He/She shall have charge of the books and records of the Corporation and such other books and papers as the Board may direct, and he/she shall in general perform all duties incident to the office of Secretary of the Corporation. He/She shall perform such other duties as may from time to time be prescribed by the Board.

**Section 5. Treasurer.** The Treasurer (also known as the "Chief Financial Officer") shall be responsible for the overall care and custody of the funds, securities and finances of the Corporation, and he/she shall in general perform all duties incident to the office of Treasurer of the Corporation. He/She shall perform such other duties as may from time to time be prescribed by the Board. The Treasurer shall be responsible for maintaining the financial records of the Corporation and any audits of the Corporation's financial statements. The Treasurer shall be entitled to delegate certain responsibilities to an assistant treasurer or the Corporation's comptroller, if any.

**Section 6. Other Officers.** The Board of Directors may appoint, or may authorize the President to appoint, one or more Vice Presidents, an Assistant Secretary, an Assistant Treasurer, Chief Academic Officer and such other Officers as the Board may from time to time decide, who shall have such authority and perform such duties as may from time to time be prescribed by the Board or designated by the President.

**Section 7. Election and Term of Office.** The Officers shall be elected or appointed at the Annual Meeting of the Board of Directors, provided that any vacancy or newly created office may be filled at a special meeting of the Board, with such Officers to be elected from a single slate of Officers nominated by the Director/Nominating Committee and approved by Majority Vote of the Board of Directors (except in the case of a vacancy, in which case only a single Officer will be elected by the Board of Directors). The Officers shall hold office at the pleasure of the Board, and any Officer may be removed, with or without cause, at any time by a majority vote of the entire Board of Directors. Unless otherwise determined by the Board, each Officer shall hold office until the next Annual Meeting of the Board and thereafter until his/her successor has been elected or appointed and qualified.

## ARTICLE VII

### STANDING COMMITTEES

**Section 1. Designation.** The committees hereinafter designated shall be Standing Committees of the Board; provided however, that if deemed advisable by the Board, certain committees may be combined and/or new committees may be established. The members of each committee, along with such committee's Chairman, shall be appointed by the Chairman of the Board



with the assistance of the Chief Executive Officer. Each committee shall have at least two (2) members, with the Chief Executive Officer serving as an *ex officio* member of each committee. Persons, who are not Directors of the Corporation, may serve on any Standing Committee.

**Section 2. Meetings.** Meetings of any committee may be requested by the Chief Executive Officer or the Board but shall be called by the Chairman or two members of the committee by giving written notice at least five (5) days prior to the date of the meeting with the notice to contain the time and place of the meeting.

**Section 3. Quorum.** The majority of the committee shall be necessary to constitute a quorum for the transaction of business, and the act of the majority of the members present at a meeting at which a quorum is present shall be the act of the committee.

**Section 4. Powers and Duties.** The powers and duties of each designated Standing Committee are as follows:

(a) Finance and Audit. This committee shall make reports and recommendations to the Board concerning all policies relating to the financial operation of the Corporation (and its subsidiaries) including the current operational budget, annual audit, and other financial endeavors. It shall work with the Chief Executive Officer and Chief Financial Officer in developing the budget (and the budgets for the Corporation's subsidiaries); shall hear the proposals of the Chief Executive Officer for salary increases; and shall study the benefits of the faculty, staff and Chief Executive Officer and it is also responsible for the insurance program of the Corporation and for the investment of the Corporation's funds.

(b) Marketing and Development. This committee shall prepare, organize and administer such fund raising campaigns, both general and special, as the Board deems necessary for the continued operation, growth, and development of the Corporation's Charter School(s). Further, the Development Committee shall work in conjunction with the Chief Executive Officer in the application for, and compliance with, any grants available to the Corporation.

(c) Academic Affairs. This committee shall make reports and recommendations to the Board of means and methods for the improvement of the education being provided by the Corporation's Charter School(s) (including under the term "education" every aspect of the school's program) and shall keep the actual curriculum under review.

**Section 5. Director Information Requests.** Each Director shall be entitled to receive information regarding the Corporation by requesting from the Chairman of the appropriate standing committee the applicable information, and the Chairman shall then obtain such information from the appropriate Officer of the Corporation and provide such information to the requesting Director.

## ARTICLE VIII.

### SPECIAL CORPORATE ACTS



**Section 1. Contracts.** The Board of Directors may authorize any Officer or agent of the Corporation to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation and such authority may be general or confined to specific instances.

**Section 2. Checks, Drafts, etc.** All checks, drafts or other orders for the payments of money, notes or other evidence of indebtedness issued in the name of the Corporation shall be signed by such Officer or agent of the Corporation and in such manner as shall from time to time be determined by the Board of Directors.

**Section 3. Deposits.** All funds of the Corporation shall be deposited to the credit of the Corporation in such banks, trust companies, brokerage accounts, investment managers, or other depositories as the Board of Directors may select.

**Section 4. Gifts and Contributions.** The Board of Directors may accept on behalf of the Corporation any contribution, gift, bequest or devise for the general purposes or for any special purpose of the Corporation.

**Section 5. Investments.** The Board of Directors, or any other Officer or agent empowered by them, shall have authority to invest and reinvest funds of the Corporation in such manner and in such property or securities as they shall approve, and to change investments hereof from time to time as they may deem expedient.

**Section 6. Fiscal Agents.** The Board of Directors may appoint and authorize fiscal agents to exercise any duty or function as they deem expedient, providing all transactions involving investment shall be approved by the Board of Directors before being made.

## ARTICLE IX.

### BOOKS AND RECORDS

The Corporation shall keep correct and complete books and records of accounts and shall also keep minutes of the proceedings of its Board of Directors, and shall keep at the registered or principal office a record giving the names and addresses of the Directors. All books and records of the Corporation may be inspected by any Director, or his agent or attorney, for any purpose at any reasonable time. There shall be an annual audit of the financial records of the Corporation in such manner as directed by the Directors.

## ARTICLE X.

### 1. INDEMNIFICATION AND ADVANCEMENT OF EXPENSES

1. **Section 1. Mandatory Indemnification of Directors and Officers.** To the maximum extent permitted by the provisions of Sections 48-58-501, et seq., of the Act, as



amended from time to time (provided, however, that if an amendment to the Act in any way limits or restricts the indemnification rights permitted by law as of the date hereof, such amendment shall apply only to the extent mandated by law and only to activities of persons subject to indemnification under this Section 1 which occur subsequent to the effective date of such amendment), the Corporation shall indemnify and advance expenses to any person who is or was a Director or Officer of the Corporation, or to such person's heirs, executors, administrators, or legal representatives, for the defense of any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative, and whether formal or informal (any such action, suit or proceeding being hereinafter referred to as the "Proceeding"), to which such person was, is or is threatened to be made, a named defendant or respondent, which indemnification and advancement of expenses shall include counsel fees actually incurred as a result of the Proceeding or any appeal thereof, reasonable expenses actually incurred with respect to the Proceeding, all fines, judgments, penalties and amounts paid in settlement thereof, subject to the following conditions:

1. (a) The Proceeding was instituted by reason of the fact that such person is or was a Director or Officer of the Corporation; and

2. (b) The Director or Officer conducted himself or herself in good faith, and he or she reasonably believed (i) in the case of conduct in his or her official capacity with the Corporation, that his or her conduct was in its best interest; (ii) in all other cases, that his or her conduct was at least not opposed to the best interests of the Corporation; and (iii) in the case of any criminal proceeding, that he or she had no reasonable cause to believe his or her conduct was unlawful. The conduct of the Director or Officer with respect to an employee benefit plan for a purpose he or she reasonably believed to be in the interest of the participants in, and beneficiaries of, the plan shall be conduct that satisfies the requirements that such person's conduct was at least not opposed to the best interests of the Corporation. The termination of a proceeding by judgment, order, settlement, conviction, or upon a plea of nolo contendere or its equivalent is not, of itself, determinative that the Director or Officer did not meet the standard of conduct herein described.

2. **Section 2. Permissive Indemnification of Employees and Agents.** The Corporation may, to the maximum extent permitted by the provisions of Section 48-58-501, et seq., of the Act, as amended from time to time (provided, however, that if an amendment to the Act in any way limits or restricts the indemnification rights permitted by law as of the date hereof, such amendment shall apply only to the extent mandated by law and only to activities of persons subject to indemnification under this Section 2 which occur subsequent to the effective date of such amendment), indemnify and advance expenses in a Proceeding to any person who is or was an employee or agent of the Corporation, or to such person's heirs, executors, administrators, or legal representatives, to the same extent as set forth in Section 1 above, provided that the Proceeding was instituted by reason of the fact that such person is or was an employee or agent of the Corporation and met the standards of conduct set forth in Section 1(b) above. The Corporation may also indemnify and advance expenses in a Proceeding to any person who is or was an employee or agent of the Corporation to the extent,





consistent with public policy, as may be provided by its by laws, by contract, or by general or specific action of the Board of Directors.

3. **Section 3. Non-Exclusive Application.** The rights to indemnification and advancement of expenses set forth in Sections 1 and 2 above are contractual between the Corporation and the person being indemnified, and his or her heirs, executors, administrators, or legal representatives, and are not exclusive of other similar rights of indemnification or advancement of expenses to which such person may be entitled, whether by law, by this Charter, by a resolution of the Board of Directors, by the By-laws of the Corporation, by the purchase and maintenance by the Corporation of insurance on behalf of a Director, Officer, employee or agent of the Corporation, or by an agreement with the Corporation providing for such indemnification, all of which means of indemnification and advancement of expenses are hereby specifically authorized. The rights of indemnification and advancement of expenses set forth in this Article shall also apply, as appropriate, to any person who was an Officer, Director, employee or agent (or any such person's heirs, executors, administrators, or legal representatives) of any association, corporation, partnership or trust which was a predecessor to this Corporation, and to any Officer, Director, employee or agent of this Corporation (or any such person's heirs, executors, administrators, or legal representatives) who is serving or served in any capacity for another association, corporation, partnership or trust at the request of this Corporation.

4. **Section 4. Non-Limiting Application.** The provisions of this Article X shall not limit the power of the Corporation to pay or reimburse expenses incurred by a Director, Officer, employee or agent of the Corporation in connection with such persons' appearing as a witness in a Proceeding at a time when he or she has not been made a named defendant or respondent to the Proceeding.

5. **Section 5. Prohibited Indemnification.** Notwithstanding any other provision of this Article X, the Corporation shall not indemnify or advance expenses to or on behalf of any Director, Officer, employee or agent of the Corporation, or any such person's heirs, executors or administrators:

1. (a) If a judgment or other final adjudication adverse to such person establishes his or her liability for any breach of the duty of loyalty to the Corporation, for acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law, or under Section 48-58-304 of the Act; or

2. (b) In connection with a Proceeding by or in the right of the Corporation in which such person was adjudged liable to the Corporation; or

3. (c) In connection with any other Proceeding charging improper personal benefit to such person, whether or not involving action in his or her official capacity, in which he or she was adjudged liable on the basis that personal benefit was improperly received by him or her.



6. **Section 6. Repeal or Modification Not Retroactive.** No repeal or modification of the provisions of this Article X, either directly or by the adoption of a provision inconsistent with the provisions of this Article, shall adversely affect any right or protection, as set forth herein, existing in favor of a particular individual at the time of such repeal or modification.

## ARTICLE XI.

### CONFLICTS OF INTEREST

**Section 1. Purposes.** The purpose of the conflicts of interest policy is to protect the Corporation when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an Officer or Director of the Corporation or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.

#### **Section 2. Definitions.**

(a) **Interested Person.** Any Director, Officer, or member of a Committee with Board of Director delegated powers who has a direct or indirect financial interest, as defined below, is an interested person.

(b) **Financial Interest.** A person has a financial interest if the person has, directly, or indirectly, through business, investment, or family:

(1) An ownership or investment interest in any entity with which the Corporation has a transaction,

(2) A compensation arrangement with the Corporation or with any entity or individual with which the Corporation has a transaction or arrangement, or

(3) A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Corporation is negotiating a transaction or arrangement.

Compensation includes direct or indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Section 3(b), a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

#### **Section 3. Procedures**





(a) Duty to Disclose. In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and disclose all material facts to the Directors and members of Committees considering the proposed transaction or arrangement.

(b) Determining Whether a Conflict of Interest Exists. After disclosure of the financial interest and all material facts, and after any discussion with the interested person, s/he shall leave the Board or Committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board or Committee members shall decide if a conflict of interest exists.

(c) Procedures for Addressing the Conflict of Interest.

(1) An interested person may make a presentation at the Board or Committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

(2) The chairperson of the Board or Committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

(3) After exercising due diligence, the Board or Committee shall determine whether the Corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

(4) If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board or Committee shall determine by a majority vote of the disinterested Board or Committee members whether the transaction or arrangement is in the Corporation's best interest, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

(d) Violations of the Conflicts of Interest Policy.

(1) If the Board or Committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

(2) If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board or Committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

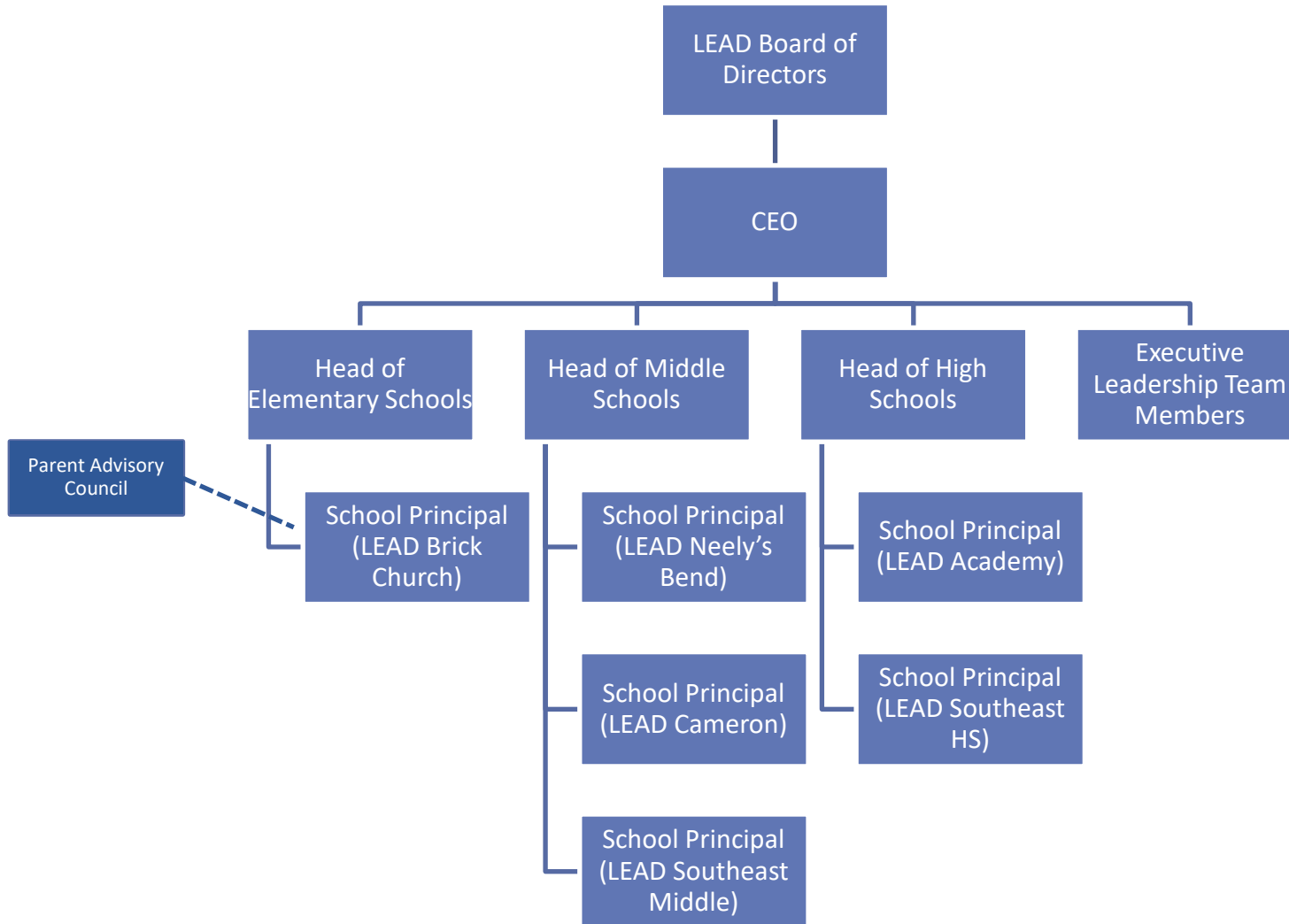


## **ARTICLE XII.**

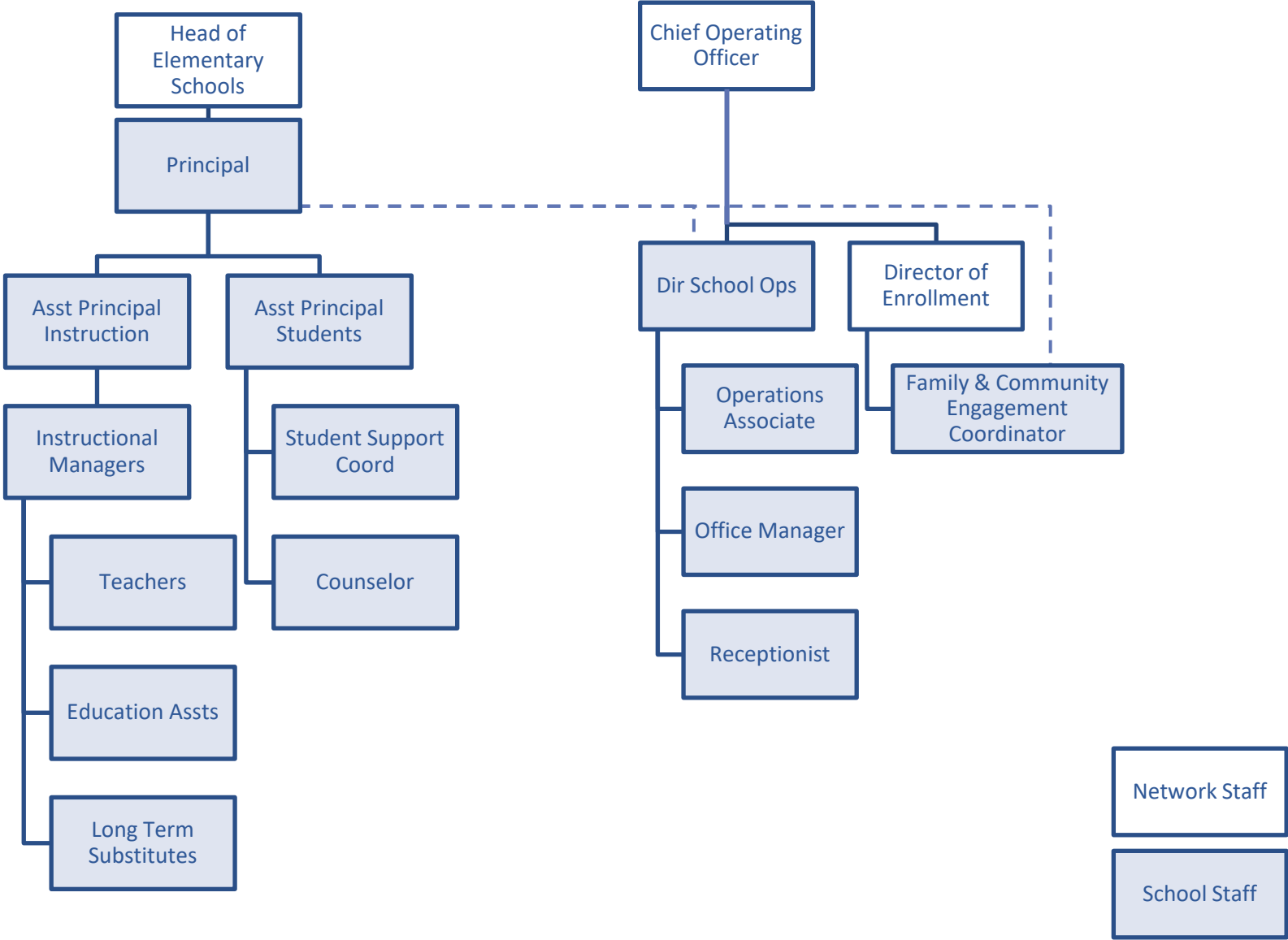
### **AMENDMENT**

The Directors of the Corporation may adopt new By-Laws and may amend or repeal any or all of these By-laws at any Annual or other meeting of the Board of Directors at which a quorum is present, by a majority vote of the entire Board, provided that the proposed amendment shall have been included in the notice of the meeting. The Secretary shall compile and maintain a list of amendments to these By-Laws, accompanied by the date of each amendment.

# LEAD Public Schools, Inc



# LEAD Brick Church





# Employee Manual

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## **ABOUT LEAD PUBLIC SCHOOLS**

Welcome to the LEAD Community! We pride ourselves on our unique spirit of teamwork and community that exists on our campus. LEAD was founded on this spirit and our ability to build and maintain strong relationships with all stakeholders in the school has been an important ingredient in our overall success. Students and staff at LEAD treat and rely on one another as family and value each other as individuals.

Employees are expected to make themselves available to fellow employees, students, and their families in order to work in the best interest of our students and school. While many other schools are marked by instructors and leaders closing the door during the day and isolating themselves from their colleagues, employees at LEAD work in a collaborative manner to reach our ambitious goal of success in college and in life for every one of our students.

As part of that community, it is important for all employees to familiarize themselves with our Mission and Ethos.

### **LEAD Mission**

**LEAD Public Schools prepares all our students with the knowledge and skills to succeed in college and in life.**

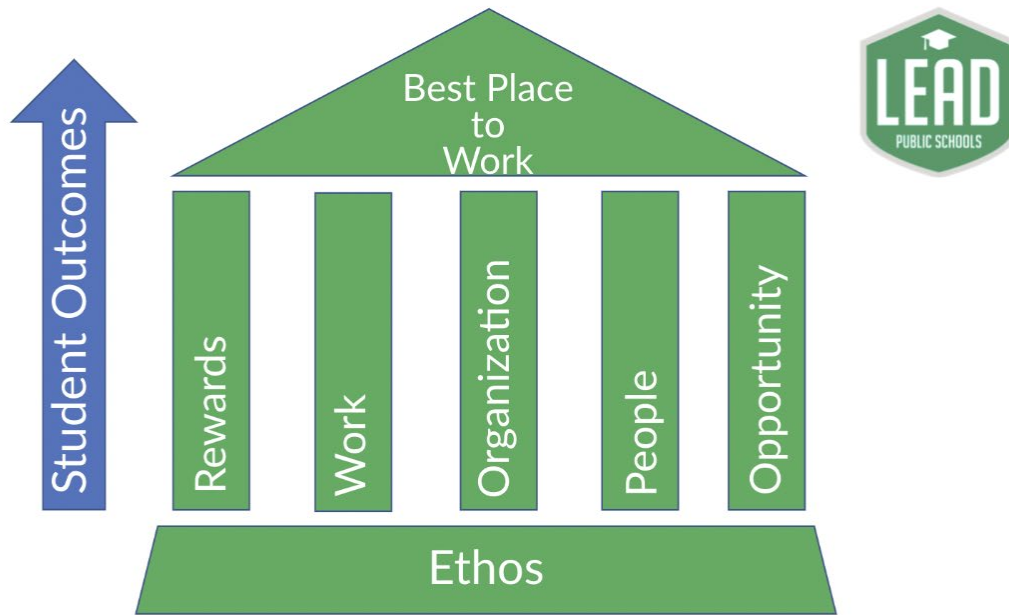
### **LEAD Ethos**

I LEAD because:

- I am Courageous
- I am Self-Reliant
- I am Disciplined
- I am Committed
- Serve Others

### **LEAD Employee Value Proposition**

Our employee value proposition is tied to our Ethos where Rewards, Work, Organization, People, and Opportunity produce Student outcomes which in turn makes LEAD Public Schools the Best Place to Work in Nashville.



**Opportunity** includes development opportunities and professional growth.

**Work** includes alignment between individual interests and work content, as well as work-life balance.

**People** includes the quality of coworker relationships, quality of leadership, and the team.

**Organization** includes mission and purpose, and reputation.

**Rewards** includes compensation, benefits, and paid time off.

## UNDERSTANDING THE HANDBOOK

### Purpose of this Handbook

Welcome to LEAD! This handbook is designed to acquaint you with our general personnel policies and practices and to summarize the key elements of the LEAD employment experience. It is designed to provide a general understanding of our personnel policies and to answer many of your questions about employment with LEAD Public Schools (LPS).

However, it is not intended to be an all-inclusive source of information and LPS may modify these policies. Modifications will be made only by the Chief Human Resource Officer and CEO;

no statement or promise by any other staff person may be interpreted as a change in the policies in this handbook. Unless otherwise indicated, this handbook supersedes all previous written or verbal policies. Neither this handbook nor any of its provisions create an expressed or implied contract of employment.

### “At-Will” Employment”

All positions at LEAD Public Schools are at-will. Either party can terminate the relationship at any time with or without cause and with or without notice.

### Employee Classification

In order to understand benefits and leave packages, employees will want to make sure they understand which policies apply to their position and how they are classified. When a new employee is hired, or when an employee moves to a new position, the employee will be classified into one of the following categories based on their method of compensation, hours scheduled to work, and responsibilities.

As responsibilities change, an employee’s classification may be changed by the Chief Human Resource Officer and employee’s manager.

All positions are classified into the following categories:

Position Classification	Employee Groups
Certified	Positions requiring a teaching certificate: <ul style="list-style-type: none"><li>• Teachers</li></ul>
Support	Positions not requiring a certificate, such as: <ul style="list-style-type: none"><li>• Principals</li><li>• Assistant Principals</li><li>• Counselors</li><li>• Education Assistants</li><li>• Operations Managers</li><li>• Office Managers and Office Staff</li><li>• Nest Staff</li></ul>

All employees are classified into the following categories:

Classification	Pay	Benefits Eligibility	Paid Time Off	Hours
Full Time Salaried	Salaried	Eligible for Benefits	Eligible	Scheduled to work 30 hours per week or more
Part Time Salaried	Salaried	Not eligible for Benefits	Eligible for PTO on a prorated basis	Scheduled to work less than 30 hours per week
Hourly	Hourly Rate	Not eligible for benefits	Not eligible for PTO	Must consistently work less than 30 hours per week

### Calendar Year vs. School Year Distinction

LEAD also classifies staff as School Year and Calendar Year employees. This distinction influences an employee’s paid time off (please see the Paid Time Off section for more details). Please see the table below for a breakdown of Calendar Year vs School Year.

Classification	Position (examples)	Definition
School Year	<ul style="list-style-type: none"> <li>● Teacher</li> <li>● Student Support Coordinator</li> <li>● Education Assistant</li> <li>● Counselor</li> </ul>	Employees who only work during the school year and are deemed School Year employees
Calendar Year	<ul style="list-style-type: none"> <li>● Principal</li> <li>● Assistant Principal</li> <li>● Instructional Manager</li> <li>● Office Manager</li> <li>● Director of Operations</li> <li>● NeST Staff</li> </ul>	Employees who work the full calendar year and are deemed Calendar Year employees

## **Certification**

Employment for teachers is contingent upon successful completion of a background check, completed reference check, and proof of valid and active certification in the state of Tennessee within 90 days of employment. Failure to obtain your Tennessee teaching license within 90 days of employment may result in termination.

To maintain acceptable standards of care, certain occupations may require licensure, certification or registration. If you are hired in a position or job classification that requires licensure, certification or registration you must present original documentation showing current licensure or eligibility at the time of your hire and thereafter, according to timeframes established by the appropriate licensing agency. A copy of this documentation must be uploaded in your personnel file in ADP. You must notify your manager immediately of any change in your licensure (initial TN license, renewal of TN license, advancement of TN license), certification or registration status. In addition to notifying your manager, you must upload a copy of the license to your employee documents in ADP. Compliance with this policy is a necessary condition for continued employment.

## **GENERAL INFORMATION AND PRACTICES**

### **Hours**

Hours are set by the manager. Employees are encouraged to discuss work hours with their manager in the first week of employment.

### **Inclement Weather Policy**

Generally, LEAD follows MNPS cancellation policies. During inclement weather, check local news stations for information regarding cancellation policies. Unless otherwise noted, LEAD will be closed when MNPS is closed. When LEAD is closed for inclement weather, all LEAD employees are not expected to fulfill their duties from home. If an employee fails to come to work when school has not been canceled, the employee must use any available accrued paid time off.

In the event of other emergency closures, management will communicate work expectations to employees as soon as possible.

## **Equal Employment Opportunity**

LEAD Public Schools does not discriminate on the basis of race, religion, creed, gender, gender identity, sexual orientation, national origin, color, veteran status, age and/or disability in admission to, access to, or operation of its programs and activities. LEAD Public Schools does not discriminate in its hiring or employment practices and complies with federal and state regulations for implementing Title IX of the Education Amendment of 1972, Title VI, Section 504 of the Rehabilitation Act of 1973 and Americans with Disabilities Act (ADA) 1990.

LEAD has adopted grievance procedures for filing, processing, and resolving alleged discrimination complaints concerning discrimination complaints concerning discrimination based upon race, color, religion, national origin, sex, age, disability, and veteran status. Any person who believes s/he has been discriminated against based upon one of these protected categories is encouraged to file a discrimination complaint.

## **Employees with Disabilities**

LPS is committed to complying with all applicable provisions of the Americans with Disabilities Act. LPS does not discriminate against any employee or job applicant who is a qualified individual with a disability on the basis of his/her disability or perceived disability in all job application procedures, hiring, firing, advancement, compensation, job training, and other terms, conditions and privileges of employment.

LPS is committed to nondiscrimination and supports the employment of qualified individuals with disabilities in our workforce. It is the responsibility of an employee to request an accommodation of his or her physical or mental disability by contacting the manager and Human Resources. LPS will determine whether the employee is a qualified individual with a disability and whether a reasonable accommodation is possible that would allow the employee to perform the essential functions of the job without imposing an undue hardship on LPS or other employees.

## **Personnel Records**

All personnel records are the responsibility of the Human Resources. Access to personnel files will be given only to those authorized people within LEAD who have a legitimate business need

to review them. All medical files will be kept separately, in accordance with HIPAA. Submit records requests to [hradp@leadpublicschools.org](mailto:hradp@leadpublicschools.org).

## **ADP – Employee Information Update**

If you have an address or personal contact information change, you should ensure that timely updates are made within ADP.

Please ensure that your personal information is updated in ADP. This information is very important when we begin to send out Tax documents, important for any Retirement accounts you may have with LEAD, and **COBRA** information to be sent out, if applicable.

You can make the updates in ADP by going to [workforcenow.adp.com](http://workforcenow.adp.com). After you log in: go to **Myself, My Information** and **Profile**. On the left-hand side under **Personal Info** click **View More** and scroll down to the address section. **In ADP: Please verify your:**

***Physical Address, Personal email address and contact number***

Former employees will have access to ADP through [adp.com](http://adp.com) to obtain a copy of their W-2 form electronically when they are available. Please follow the steps below to review your options and elect to receive your W-2 electronically.

**Myself > Pay > Annual Statements** 1. On the Annual Statement page, click **Go Paperless**. 2. Select **Access my Annual Statements online only** check box and click **Next**. 3. Read the information, click **I Agree**, and click **Next**. 4. Enter the confirmation number, and click **Next**. 5. Click **Done**

If you have any questions, please feel free to contact the Human Resources by email at [hradp@leadpublicschools.org](mailto:hradp@leadpublicschools.org).

## **Employment Verification/References**

LEAD Public Schools contracts with an outside vendor to handle employment verifications for current and former associates. The Work Number is a service that provides our Company with an automated process. It allows employees to have their employment and salary verified within a matter of minutes. This fast, secure service is used for mortgage applications, reference checks, loan applications, and apartment leases; anything that requires proof of employment. For additional information on how to use the system, contact The Work Number client service center at 1-800-996-7566.

[www.theworknumber.com](http://www.theworknumber.com)

Provide Company Code: 119585

## Provide Your Social Security Number

No LEAD employees should verify any employment information or provide a reference unless approved by Human Resources. Our policy is to release only the dates of employment and job title and to verify salary, and not to release or verify any additional information.

## Personal Property

LPS is not responsible for and will not reimburse employees for lost or stolen personal property. Unless an employee's Manager requests that s/he bring her/his property to LPS for work related purposes, LPS cannot and will not be responsible for it. Personal items like I-Pads, digital cameras, laptops, jewelry, etc. should be left at home. If an employee must have items of personal property at work, it is requested that employees keep them on their person at all times while on LPS premises.

# EMPLOYEE CONDUCT

## Role Model Policy

Every Employee is a Role Model for the youth attending LEAD. Regardless of the position an employee may hold within LEAD, every LEAD employee, volunteer and contracted employee must recognize that we are all role models for the youth we serve. As such, our behavior, both on the job and when in the public eye, must be consistent with our goal of providing positive role models to all our youth. This includes but is not limited to acting, speaking and conducting oneself in a professional manner with a courteous attitude.

It shall be the continuing policy of LEAD to be intolerant of any behavior that negatively impacts the employee's ability to serve as a positive role model or which otherwise compromises the LEAD philosophy, the integrity of its models of care, or its credibility with students, their families and the public. LEAD will carefully and thoughtfully investigate charges of inappropriate behavior and will impose appropriate disciplinary sanctions, up to and including the termination of employees whose conduct is found to be detrimental to their roles as positive models for student behavior.

## Positive Role Model Definition

LEAD Public Schools defines a Positive Role Model as such:

- A positive role model recognizes that one's conduct is an informational base for student behavior.



- A positive role model is one whose own behavior at all times demonstrates the appropriate behaviors and attitudes we seek from the child/youth in our care.
- A positive role model is one whose own behavior is absent from any illegal conduct.
- A positive role model demonstrates self-respect and respect for their co-workers and youth in our care.
- A positive role model is one whose own behavior is absent of conduct which violates any of the following:
  - Sexual and Harassment Policy
  - Child Abuse Policy
  - Substance Abuse and Drug-Free Workplace Policy
  - Any program or facility policy which serves to define or delineate staff/student relationships.
- A positive role model is one whose own behavior (including social media presence), even if away from students or work, is such that if it became public knowledge or known to students it would not undermine, diminish or limit the relationship with youth or have the potential to negatively impact the behavior of youth. This is particularly true of social media use.

### **Response to Allegations of Inappropriate Behavior**

LEAD employees are required by this policy to immediately report to their direct manager, the Director of Human Resources, or any other member of management with whom they feel comfortable any action initiated, observed, or learned of, that constitutes, or may constitute inappropriate behavior. This includes any procedure, practice or ethical standards of LEAD and the human services profession. Management is required to ensure filing of appropriate state reports if applicable. In the event a charge of inappropriate behavior is made, all allegations shall be carefully and thoughtfully investigated internally and reported to the appropriate Director of Human Resources and, if the alleged activity may also be illegal, to the appropriate local, state or federal authority.

**Legal Consequences:** If an employee engages in illegal actions described herein, law enforcement authorities shall be called and one is subject to being charged under appropriate local, state or federal laws.

**Employment Consequences:** Violation of this policy, either by misconduct or by failure to report as required, constitutes a major policy violation and may subject the employee to discipline, up to and including termination for the first offense.

LEAD Public Schools takes the Role Model Policy very seriously. Employees should only sign and acknowledge this manual after having received clarification of any part of the Role Model Policy not understood. No employee shall be permitted to have contact with students until the employee understands and has signed the employee manual acknowledgement. Refusal to sign shall constitute cause for discharge from employment.

## Harassment Policy

It is LPS policy that all employees are responsible for assuring that the workplace is free from all forms of harassing behavior. Harassment may consist of unwelcome conduct, whether verbal, physical, or visual, that is based on a person's race, color, religion, sex, sexual orientation, age, national origin, ancestry, disability or other legally protected status. LPS will not tolerate harassing conduct that creates an intimidating, hostile, or offensive work environment, that interferes unreasonably with an individual's work performance, or that affects job benefits.

Because of LPS's strong disapproval of offensive or inappropriate sexual behavior, all personnel must avoid any action or conduct which could be viewed as sexual harassment. Sexual harassment may include unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- Submission to such conduct is made either explicitly or implicitly a term or condition of employment; or
- Such conduct has the purpose or effect of creating an intimidating, hostile, or offensive working environment.

To maintain a harassment-free workplace, the following conduct is prohibited:

- Verbally abusing or "kidding" that is related to one's race, color, religion, sex, sexual orientation, age, national origin, ancestry or disability and considered unacceptable by another individual. This includes comments about an individual's body or appearance/clothing (where such comments go beyond mere compliment), off-color jokes that are clearly unwanted or considered offensive by others, or any other tasteless comments or innuendoes.
- Creating a work environment that is intimidating, hostile, abusive, or offensive because of the display or circulation of offensive written materials (including electronic mail), unwelcome conversation, suggestions, requests, demands, physical threats, or physical contacts.
- Threatening or insinuating that an employee or applicant should submit to sexual advances or that refusal to submit to sexual advances will adversely affect employment, including evaluation, wages, promotional opportunities or work tasks.

- Giving favorable treatment in any way to an employee or applicant because that person has shown a willingness to perform sexual activities.
- Making unwelcome or unwanted sexual advances. This includes patting, pinching, brushing against, hugging, cornering, kissing, fondling, or any other similar physical contact considered unacceptable by another individual.
- Displaying sexually suggestive objects or pictures, including nude photos, in the workplace.
- Classroom assignments or classroom discussion that is racist, sexually explicit or otherwise discriminatory without a legitimate academic purpose.
- Any other harassing conduct that would unreasonably interfere with another's work performance.

Any employee who has a complaint of harassment or who has witnessed harassment by anyone at LPS (including manager, co-workers or visitors) must bring the problem to the attention of their manager, the Director of HR, or any other member of management with whom they feel comfortable. Retaliation against an employee for bringing a complaint is prohibited. Violation of this prohibition against retaliation may result in discipline up to and including termination.

All complaints will be investigated promptly and thoroughly and appropriate action will be taken to the extent reasonably possible. Confidentiality with respect to reports and related investigations will be maintained. LPS will retain confidential documentation of all allegations and investigations and will take appropriate corrective action, including disciplinary measures when warranted up to and including termination, to remedy any violation of this policy.

## **Consensual Relationships in the Workplace**

LEAD Public Schools requires employees to notify their manager and Director Human Resources if they are in a romantic relationship with another employee. In accordance with the Sexual Harassment Policy, romantic relationships must be entirely voluntary and consensual, may not have a negative impact on the working environment, and both employees in the relationship must agree to not engage in any public displays of affection or other behavior that might create a hostile work environment for others or that might make others uncomfortable.

One or both employees of the relationship may need to transfer to another department or location to remove any conflicts of interest in our working environment. If a transfer will not remove the conflict of interest, one employee may have to resign or be demoted to remove the conflict of interest. LEAD Public Schools will first ask the employees to choose which employee will be subject to a transfer, demotion or resignation. If the parties fail to choose, LEAD Public Schools will choose for the individuals and will make such a decision without regard to any

protected class characteristic and in compliance with LEAD Public Schools' Equal Opportunity Policy.

Employees in a consensual relationship must act professionally toward each other at all times, even after the relationship has ended, and may not participate in any company decision-making processes that could affect each other's pay, promotional opportunities, performance reviews, hours, shifts or career, while in the relationship or after the relationship ends. If the relationship ends, both employees agree to respect the other person's decision to end the relationship and will not retaliate against the other person, engage in any unprofessional or inappropriate efforts to resume the relationship, or engage in any other conduct toward the other person that could violate the Sexual Harassment Policy.

## **Attendance Policy**

Faithful attendance of all employees, as scheduled, is an important element in the operation of LEAD Public Schools (LPS). Excessive absenteeism or tardiness, or a combination of the two, will result in progressive discipline up to and including termination. All planned absences must be approved by the Manager at least ten (10) days in advance. For unplanned absences, please contact the Manager via cell phone as soon as possible so that arrangements can be made.

## **Employee Responsibility**

1. Report for work on time and as scheduled.
2. Ensure that the employee's manager is properly notified if the employee needs to request time off.
3. Request time off from work in ADP. If possible, the request should be submitted in ADP prior to the absence.
4. Provide medical statements when required for the use of Paid Time off.
5. Take steps to correct problems which frequently cause excessive absences or tardiness.
6. Log into ADP for accrual paid time off balance and use.

## **Dress Code**

The following policy and guidelines support a professional work environment, and as such, require all employees to adhere to a business-professional dress code. Appropriate professional dress extends beyond the classroom and allows any school visitor – whether it's a family or potential student, job candidate, volunteer, donor, etc. – to view our employees as the

outstanding professionals that they are. Our dress code is designed to help us all provide a consistent professional appearance, as it reflects on ourselves and the greater network as a whole. For employees and volunteers, professional dress is defined as:

- **All days:** employees should wear their Employee ID at all times on a LEAD-issued lanyard, displaying either LEAD or their LEAD campus branding.
- **LEAD Business Professional: (Monday through Thursday Schedule):** “Business professional” is defined as a tucked-in button-down collared shirt or polo, and belt, (wearing a tie is *optional*) and slacks/khakis or a blouse and slacks/khakis, skirt or dress of appropriate length and fit. Professional dress shoes are *required* (see your manager for *examples/non-examples*). Sneakers are not allowed as part of professional attire unless you are a PE teacher. Headwraps/scarves are permitted in the workplace.
- **LEAD Business Casual: (Friday and Summer Schedule):** “Business Casual or College/LEAD Attire” is defined as a LEAD polo or t-shirt, or a college/university shirt, belt and long pants or dress skirt. Sneakers are permissible on Friday.
  - **“Dress Down Fridays”** - On the first and third Fridays of the month, jeans are permissible as a part of the LEAD Business Casual Dress Code.

**\*Note:** LEAD Business Casual is appropriate during the summer unless you are attending a LEAD sponsored event or a LEAD sponsored event is taking place on your campus. Examples of LEAD sponsored events include but are not limited to LEAD University Professional Development, Summer School, Data Days, etc.

***Clothing that is not allowed on any day, includes, but is not limited to:***

- Jeans or shorts are not permissible of any color. (Dress down Fridays are permitted on the first or third Fridays of the month)
- Attire that includes language or graphics that are vulgar, sexually explicit, or may otherwise be offensive.
- Sweatpants, athletic apparel, yoga pants, shorts or leggings as trousers. Athletic apparel is appropriate for PE teachers on days in which they are teaching a PE course or for teachers on an appropriate field trip.
- Shoes that are not conducive to a productive and professional working environment, including flip-flops, or heels three inches or higher. Professional dress shoes are required.
- Revealing clothing, low-cut shirts, any items bearing the midriff, and shorts, tank tops, strapless or off-the-shoulder shirts or dresses.

- Hats or baseball-style caps are not permitted during school operating hours within school buildings.

**Employees who are not confident their attire meets the LEAD dress code should err on the side of modesty and ask their manager for guidance.**

Accommodations to the dress code may be made for religious beliefs. Employees requesting accommodations for religious or other reasons should speak to their manager. The Head of Schools and Director of Human Resources will review requests for approval. Dress code infractions will be handled on an individual basis by the Head of Schools and Director of Human Resources based on failure to adhere to the dress code policy.

### **Summer Time Dress**

- **When does summer time dress apply?** After the school year officially ends and students are not present, but prior to LEAD University.
- **What if there are no students in the school building, and we are closed for business?** The dress code is relaxed meaning that team members can wear shorts, jeans, and sneakers tastefully if they so choose.

### **Fitness for Duty**

Employees are required to report that they are taking medication that may affect their ability to perform their job duties; however, employees are not required to identify the medication or health condition that requires them to take medication. If an employee is restricted from performing certain job duties because he or she is taking medication, he or she must provide a statement from a physician.

### **Drug-Free Environment and Substance Abuse Testing**

As a recipient of federal grants, LEAD maintains a drug-free workplace pursuant to the requirements of the Drug-Free Workplace Act. Lead Public Schools is committed to providing a safe work environment and to fostering the well-being and health of its employees. That commitment is jeopardized when any Lead Public Schools employee illegally uses drugs on or off the job, comes to work under their influence, possesses, distributes or sells drugs in the workplace, or abuses alcohol on the job. Therefore, Lead Public Schools has established the following policy, pursuant to T.C.A. Section 50-9-100 et.

- It is a violation of company policy for any employee to use, possess, sell, trade, offer for sale, or offer to buy illegal drugs or otherwise engage in the illegal use of drugs on or off the job.

- It is a violation of company policy for any employee to report to work under the influence of or while possessing in his or her body, blood or urine, illegal drugs in any detectable amount.
- It is a violation of company policy for any employee to report to work under the influence of or impaired by alcohol.
- It is a violation of the company policy for any employee to use prescription drugs illegally, i.e., to use prescription drugs that have not been legally obtained or in a manner or for a purpose other than as prescribed. However, nothing in this policy precludes the appropriate use of legally prescribed medications.
- Violations of this policy are subject to disciplinary action up to and including termination.

Everyone shares responsibility for maintaining a safe work environment, and co-workers should encourage anyone who has a drug problem to seek help. LEAD Public Schools provides free confidential counseling to employees through our Employee Assistance Program (please see the Benefits section for additional information).

As a condition of employment, employees must abide by the terms of this policy and must notify LEAD Public Schools in writing of any conviction of a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction. LEAD Public Schools reserves the right to require a pre-employment drug test, or, with probable cause, require an employee to undergo substance abuse testing. Failure to submit to a required substance abuse test also is misconduct and also shall be subject to discipline up to and including termination.

By signing the employee manual, employees consent to submit for a drug and/or alcohol test, if requested. Failure to comply with a drug and/or alcohol testing request or a positive confirmed result for the illegal use of drugs and/or alcohol may lead to discipline up to and including termination of employment and/or loss of workers' compensation benefits. Employees consent to urinalysis and/or other tests as shall be determined by LEAD Public Schools in the selection process of applicants for employment, for the purpose of determining the drug content thereof. Employees agree to hold harmless LEAD Public Schools and its agents from any liability arising in whole or part out of the collection of specimens, testing, and use of the information from said testing in connection with LEAD's testing.

## **Smoking/ Tobacco Use**

All LEAD Public Schools campuses are tobacco free.

## **Background Check and Fingerprinting**

LEAD Public Schools complies with state law in ensuring all employees have a cleared background check and fingerprinting prior to working at LEAD. Employees must be cleared prior to working at LEAD. The cost is the responsibility of the employee. In accordance with state law (TCA 49-5-413), employees will be rescreened every five (5) years. Additionally, employees must be cleared through the Department of Children's Services background check system. A failure on a background check may be grounds for termination in accordance with state law and local district policy.

## **Intentional or Unintentional Misuse, Improper Disclosure, or Dissemination of Criminal History Records Information (CHRI):**

If CHRI is improperly used, disclosed, or disseminated (regardless of whether this misuse, disclosure, or dissemination was intentional), the Chief Human Resource Officer or Director of Human Resources shall be notified immediately. Depending on the nature and circumstances of the misuse, disclosure, or dissemination, the parties involved may be reprimanded or subject to disciplinary action up to and including termination. The willful, unauthorized disclosure of CHRI may also result in state or federal prosecution.

## **Proprietary Information**

Employees who work with confidential and proprietary information of LPS, such as student information, employee records or pay, financial data, fundraising proposals, etc., must use such information only for LPS business purposes and must keep such information confidential during and after employment by LPS. LPS will use legal means, if necessary, to protect its interest in proprietary information.

## **Technology Loan Agreement**

LPS provides all Teachers and certain Support Staff a laptop for the purpose of enhancing the employee's ability to fully carry out his/her responsibilities. Employees who take advantage of this opportunity will be responsible for operating, maintaining and exercising control and possession of their technology at ALL times during the period that the device is on loan. The staff person should return the device to LPS in as good working condition as when it was



delivered to them, ordinary wear and tear expected. Individuals shall reimburse LPS for repair or replacement of LPS property lost, stolen damaged or vandalized while under their care, due to gross negligence or willful abuse, including damage resulting from unauthorized downloads or alterations to existing data, with the understanding that those costs will not exceed the original cost of the lost or stolen machine. LPS reserves the right, at any time and for any reason, to exchange the device or to ask that a machine be returned. Employees also agree not to download any illegal software onto their computer or tablet. All LEAD issued technology must be returned prior to an employee's last day of employment at LEAD.

## **Information Technology & Computer Software**

Employees are encouraged to use LPS technology resources to promote student learning and communication with the home and education-related entities. LPS's information systems and systems equipment are provided to employees for LPS business purposes. In no event shall an employee use LPS's information systems in a way that may be disruptive or offensive to others, or in violation of LPS's policy or any law. LPS's policy against sexual and other harassment applies fully to the use of information technology. Technology-based materials, activities and communication tools shall be appropriate for and within the range of the knowledge, understanding, age, and maturity of Students with whom they are used.

All information contained in or arising directly or indirectly from the use of LPS's information systems and systems equipment constitutes LPS business records and is the property of LPS. For example, this includes, but is not limited to:

- electronic mail messages
- voice mail messages
- contacts
- computer files
- passwords
- computer data
- information obtained from on-line services and the Internet

Examples of prohibited activities on LPS information systems include, but are not limited to:

- Making offensive or harassing statements, including disparagement of others based on race, color, national origin, ancestry, sex, sexual orientation, age, disability, religion or any other basis prohibited by applicable law;
- Sending, downloading or soliciting sexually oriented messages or images;
- Knowingly using LPS systems to download or distribute pirated software or data;

- Distribute or print copyrighted materials in violation of copyright laws, or create or process unlicensed copies of copyrighted software.
- Use LPS systems to propagate any virus, “worm,” or other destructive code.
- Use a code, access a file or retrieve any stored communication unless they have been given authorization to do so. Each employee is responsible for the security of his/her own password.

LPS reserves the right to access, monitor, intercept and/or disclose any of the foregoing information for any purpose at any time. Employees should have no expectation of personal privacy in any material stored, created, received, or sent using any of LPS’s information technology tools. Accordingly, employees should be aware that information such as electronic mail messages, voice mail messages, and computer files are not personal, private, or confidential and may be accessed, monitored, intercepted and/or disclosed by LPS in its sole discretion. All passwords must be disclosed to the network administrator.

In addition, all files and work products created during, or related to, an employee’s tenure at LPS are the property of LPS. The location of all files and work products needs to be communicated to an employee’s manager prior to their last work day. No files or work product may be duplicated or removed without the express written consent of the CEO. Work product specifically includes contact information collected or used as a part of business either in hard copy or electronic media.

LPS has purchased or licensed the use of computer software solely for its own operation; LPS does not own the copyright to this software or its related documentation and, unless authorized by the software developer, does not have the right to reproduce it for use on more than one computer.

## **Media Inquiries**

The CEO and Director of Communications are the official media representatives of LPS, who disseminate information to the media and arrange press interviews. All inquiries from the media should be promptly referred to the Director of Communications. No LPS employee shall represent him or herself as a spokesperson for LPS without prior approval of the Director of Communications. Employees may not have “off the record” conversations with the media. Employees are not authorized to extend the use of the LPS name to endorse any private or public candidate, project, service, or cause. Employees wishing to support such endeavors must make it clear to the public that the thoughts and viewpoints expressed are their own and not those of LEAD Public Schools.

## **Social Media Policy**

It is important that all employees consider how their actions outside of the walls of the school may impact their work. We need to be mindful about the public nature of social media and how it may impact our professional life at LEAD Public Schools. Be aware that anything you post online can be accessible to others outside of your immediate circle.

Please stop and consider the following guidelines before posting or sending information:

- Employees should not invite or accept students to be members of their immediate social group on social media sites (for example, employees should not “friend” their students on Facebook).
- While employees may post generic information online about their school, including celebrating achievements, publicizing events or sharing pictures of their school or students, to protect the privacy of all students, employees may not identify any students or their family members by name. Employees must also be careful to not post any personal or academically sensitive information about any students at LEAD (for example, noting a particular student as having an IEP or being homeless).
- Employees should also be cognizant of their online interactions with students and other adult members of the LEAD community. Employees will be responsible for any exposure/access by students and other members of the LEAD community to inappropriate or unprofessional content, including words or pictures.
- Online discourse is individual interactions, not LPS communications. Employees are personally and legally responsible for their own communications.
- When posting about education related matters, employees must identify themselves and make it clear that they are speaking for themselves alone.
- Employees may not discuss or divulge confidential LPS information, including, but not limited to student information, proprietary information that has not been made public, or other copyrighted materials.

## **Political Activity at LEAD**

LEAD wants to provide clarity around what is allowable with respect to political campaigns, endorsements, and communication. An employee’s choice to work within a public school system does not restrict them from expressing their rights as a citizen; however, it must be evident that any political activities LEAD employees engage in are undertaken solely on behalf of the individual personally, and not as a representative of our school system. While LEAD Public Schools is a network of charter schools that are operated separately from MNPS, LEAD

follows the MNPS policies and procedures as it relates to endorsements of candidates and involvement in political campaigns. Below is some specific guidance:

- Endorsement: LEAD employees may not endorse a candidate or support a political campaign on behalf of our school system or any of our campuses.
- Social Media: Employees may retweet, like a post, or share information about politically affiliated organizations or candidates, but endorsements need to be communicated clearly as being voiced from the employee as an individual, not as a LEAD Public Schools staff person. Any social media activity in support of a candidate must be made from an employee's personal account, not school accounts.
- Volunteering: Employees may volunteer for any campaign or attend political events, but may not do so as a representative of LEAD Public Schools, its affiliate campuses, and employees may not wear school branded attire.
- Marketing or Information Sharing: Any information that employees share on behalf of any political candidate should not be done so using LEAD school email account, media sites, webpages, or on school property. Employees may put marketing information (such as flyers, signs, stickers, etc.) on their personal property, such as their yard or car, but they may not bring any political marketing material on school property and staff may not conduct any political activities on school properties.

## **Fundraising**

LEAD Public Schools strives to provide employees with all the resources they need to be successful in the classroom. Should an employee have additional needs, we encourage them to speak with their Principal. Any fundraising activities must be approved by a school manager in collaboration with our Vice President of Development. Employees should not create fundraisers (such as online fundraising pages, local fundraising events, etc.) without first receiving approval.

## **Ethics Compliance Policy**

LPS is committed to maintaining a positive, ethical work environment for all employees. Further, the school is also committed to facilitating open and honest communications relevant to our governance, finances, and compliance with all applicable laws and regulations. It is important that LPS be apprised about unlawful or improper behavior including, but not limited to, any of the following conduct:

- theft or fraud
- abuse or misuse of LPS's resources or assets
- financial reporting that is intentionally misleading
- improper or undocumented financial transactions
- harassment of any kind (as defined in the Personnel Policy)
- any behavior that violates the Personnel Policy or City, State or Federal laws
- any other improper occurrence regarding cash, financial procedures, or reporting

We request the assistance of every employee who has a reasonable belief or suspicion about any improper conduct. LPS values this input and each employee should feel free to raise issues of concern, in good faith, without fear of retaliation. Employees will not be disciplined, demoted, lose their jobs, or be retaliated against for asking questions or voicing concerns about conduct of this sort.

At the same time, LPS expects all employees to take this policy seriously, to use it in good faith, and to use it when necessary and in a judicious manner. Reports that are not made in good faith, or otherwise are intended to harass or annoy an employee, may result in disciplinary action, including termination.

We encourage any employee who has a concern regarding an action concerning LPS's governance, finances, ethics policy or compliance with all applicable laws and regulations to raise the concern with their Manager, Chief Human Resource Officer or CEO.

If for any reason the employee does not believe these channels of communication are adequate, the concern should be reported immediately to the chair of the Board. The Board Chair will coordinate the investigation and LPS will take appropriate action as it deems justifiable by the circumstances.

## **Problem Resolution**

From time to time, employees may have concerns in the workplace. LEAD Public Schools believes strongly that these matters should be aired and resolved in an orderly fashion, rather than be ignored. LEAD Public Schools requests that issues be handled in the following way:

1. The concerned employee should first raise the matter with their direct manager. Employee and direct manager will determine next steps and whether or not HR should

be involved. If the matter concerns their direct manager, the concerned employee should go directly to HR.

2. If the concern persists after a reasonable attempt to resolve it, the employee should submit, in writing, a description of the problem to their direct manager and HR.
3. Once the concern has been submitted in writing, HR will conduct a comprehensive review to determine appropriate actions and next steps.
4. Once the comprehensive review is complete, HR will communicate the decision to the concerned employee and any other relevant parties.

## **Employee Conduct and Progressive Disciplinary Action Policy**

Working at LPS requires an understanding of our commitment to teamwork on all levels and mutual respect amongst all employees. Implicit in these principles is the acknowledgement that every employee is a role model for the youth attending LEAD Public Schools and behavior contradictory to this is unacceptable and may be grounds for disciplinary action up to and including termination.

Generally, LEAD Public Schools uses a progressive disciplinary action model in which the severity increases each time an infraction continues to occur. A manager may take corrective disciplinary action regarding infractions to correct employee behavior by initiating any of the following, including but not limited to, verbal counseling, written reprimand, suspension and termination. Progressive disciplinary action is taken to correct an infraction and ensure transparency between a manager and employee. Progressive discipline is dependent upon the situation and is not always a sequential process.

### **Grounds for Disciplinary Action:**

The following is not an exhaustive list, but constitutes grounds for disciplinary action:

1. Insubordination toward the manager.
2. Absence without notification or absence recorded as an unexcused absence.
3. Drinking intoxicating beverages, using drugs not specifically prescribed to the employee by a licensed physician or using a controlled substance while at work, whether under the influence of the beverage, drug, or controlled substance or not.
4. Being under the influence of intoxicating beverages or drugs not specifically prescribed for the employee by a licensed physician or controlled substances when at work or upon reporting to work.
5. Possession of illegal drugs or a controlled substance while at or away from work.

6. Violation of any written rules, policies or procedures of the school in which the employee is employed or LEAD Public Schools.
7. Dishonesty.
8. Conviction of a felony.
9. Inability to perform duties, when reasonable accommodation has been considered and cannot be made.
10. Neglect or failure of any employee to properly and promptly make reports or furnish information specifically required by LEAD Public Schools.
11. Excessive absenteeism and/or excessive tardiness and/or abuse of sick leave.
12. Violation of safety rules, regulations or procedures.
13. Unauthorized sleeping while at work.
14. Damage to or loss of LEAD Public School property caused by negligent acts of the employee.
15. Unlawful or unauthorized possession of a weapon, as defined by applicable laws, while at work or while on LEAD Public School property.
16. Using abusive or profane language so as to create a disturbance in the workplace.
17. Falsifying employment or any official document of LEAD Public Schools.
18. Disclosing confidential information to unauthorized persons.
19. The use or threat of violence or intimidation when directed toward another person.
20. Discrimination on the unlawful basis of race, sex, color, age, religion, national origin, handicap or lawful political or employee group affiliation.
21. Participation in a pattern of harassment toward an employee of LEAD Public Schools.
22. Conduct unbecoming an employee of LEAD Public Schools as defined as immoral, unethical, or illegal conduct.

LPS reserves the right to immediately dismiss employees for any of the aforementioned infractions, which is not an exhaustive list.

## **Solicitation Policy**

Employees should be able to work in an environment that is free from unnecessary annoyances and interference with their work. In order to protect our employees and visitors, solicitation by employees is strictly prohibited while either the employee being solicited or the employee doing the soliciting is on “working time.” “Working time” is defined as time during which an employee is not at a meal, on break, or on the premises immediately before or after a shift. Employees are also prohibited from distributing written materials, handbills, or any other type of literature on working time and, at all times, in “working areas,” which include all office areas. “Working areas” do not include break rooms, parking lots, or common areas shared by

employees during nonworking time. Nonemployees may not trespass or solicit or distribute materials anywhere on company property at any time.

## **Leaving LEAD Public Schools**

We hope that you will remain with us for a long time. However, if you find it necessary to resign your position, we request that you give your manager a minimum written notice of two (2) weeks. Management employee positions are requested to provide four (4) weeks notice. The reason for your termination should be included within the resignation notice. Failure to give the minimum requested notice makes you ineligible for rehire. LEAD Public Schools reserves the right to accept an employee's resignation immediately and shall not be obligated to allow the employee to continue to be employed following notice of termination. LEAD Public Schools is under no obligation to pay the associate for the notice period should the decision be made to accept the resignation immediately. Employees are expected to work all hours scheduled for the period of the notice and are not permitted to take Paid Time Off (PTO) during this period unless authorized in writing by the employee's immediate manager. If this commitment is not fulfilled, it will be considered a voluntary termination without proper notice. Benefits will be terminated on your last day of employment.

## **Return of Company Property**

Terminated employees will be responsible for returning any property of LEAD Public Schools in their possession or that has been assigned to them including, but not limited to, identification badges, keys, credit cards, office supplies, equipment, laptop/computer, electronic devices and company documents or materials pertaining to LEAD Public Schools. Company documents are those relating to LEAD Public Schools business, whether originals or copies, whether or not you were the author or recipient, whether maintained in electronic, magnetic or disk format, which are in your possession or control, regardless of whether such documents contain confidential information or trade secrets. Documents related to your personal performance, evaluations, compensation or benefits may be retained by you. Issuance of the final paycheck may be contingent upon recovery of all LEAD Public Schools property, to the extent permitted by law. Deductions for the cost of replacement or repair for property lost or damaged while in an employee's possession may be deducted from the final paycheck, to the extent permitted by law. In the event federal, state or local law prohibits deduction from your check, you will be expected to make payment to LEAD Public Schools for such loss or repair within 30 days to avoid collection efforts.

## **Rehire**



Former employees who terminated in good standing are eligible for rehire. A former associate who wishes to be considered for rehire must submit an employment application and follow the normal procedures required of any candidate for employment.

## **COBRA**

LPS complies with all federal and state guidelines governing COBRA coverage. Upon termination of employment with LPS, employees will be provided with COBRA forms by their insurance provider. Forms must be filled out to either accept or refuse coverage. If an employee opts to continue coverage he or she will be responsible for the entire premium on a monthly basis. All forms and payment must be made directly to the insurance provider, not LPS. If an employee opts to continue insurance coverage, there will be no gap in coverage.

## **PROCEDURES FOR WORKING WITH STUDENTS**

Below are the general procedures for working with students for the LEAD Public Schools network. All employees should familiarize themselves with these procedures.

### **Transporting Students in Cars**

It is the policy of LEAD that employees not transport students in their own vehicles.

### **Responding to Fights**

If a fight occurs, you are NOT TO INTERVENE PHYSICALLY. DO NOT allow other students to intervene. Direct non-involved students to leave the area (for example, if the fight is in the hallway, direct them into the nearest classroom). VERBALLY direct the students engaged in the fight to stop. As long as the situation is safe for you to remain in the area, monitor and continue to direct the fighting students to stop immediately. If possible, send a non-involved, trustworthy student to report the incident to school leadership or another employee for help. If a fight occurs and you are a witness, you must report the incident by email to your manager as soon as possible.

### **Reporting Child Abuse**

Students will indicate abuse directly by disclosing it to you, or you may suspect abuse by observing injuries (bruises, cuts, etc.). If a student discloses any abuse to you or if you suspect abuse, it is your legal obligation to report that abuse to the Department of Children's Services (DCS) and your manager. Regardless of whether or not you believe the student, you must report any reported abuse. Abuse can be disclosed as physical, emotional, or sexual. To report abuse, call 1-877-237-0004 or report on-line at <https://carat.app.tn.gov/carat/>. If you would like assistance in making the report, ask school leadership for assistance. If you believe the child is in imminent danger, report the abuse immediately to a school leadership who will work with you to contact the appropriate authorities.

## **Disclosure of Intent to Harm Self or Others**

If a student discloses self-harm or you suspect that a student is self-injuring, report concerns immediately to a school leadership who will work with you to contact the appropriate assistance for the student.

## **School Safety**

All employees are expected to promote school safety. Employees should not prop open doors or distribute access codes or keys to any other individuals. All employees are expected to follow the safety procedures outlined in their campus safety plan.

## **Handling Student Data**

Student data at LEAD is protected by FERPA. Electronic data must be kept secure at all times. In dealing with data, employees should observe the following practices:

1. When sending student data electronically to any party outside of LEAD, remove any identifying information that might connect students to the school
2. When emailing, use students initials instead of full name to maintain anonymity in communication
3. Keep all student test scores, grades, evaluations, and other personal information locked when not in use
4. Student cumulative files are kept filed in the main office or the SPED offices and are NOT TO LEAVE those rooms. When not in use, they are kept in the locked cabinets
5. Student information on your laptop should be password protected; putting a sleep password on your laptop will sufficiently protect the data.

Among its several purposes, the Federal Family Educational Rights and Privacy Act of 1974 (FERPA) was enacted to protect the privacy of a student's educational record by limiting disclosure of the records, to establish the right of students to inspect and review their educational records, and to provide guidelines for the correction of inaccurate or misleading data through informal and formal hearings. The Act also provides for LEAD's disclosure of certain "directory information." Students have the right to file complaints with the Department of Education's Family Educational Rights and Privacy Acts Office concerning alleged failures by an institution to comply with the Act.

## COMPENSATION

### Pay Day

Current paydays are every other Thursday for all employees. In the computation of hourly pay and employee benefits, the employee workweek is considered to begin at 12:00 am on Saturday and end at 11:59 pm on Friday. LEAD Public Schools pays its employees over 26 pay periods each year; all Salaried Staff who work a full school year will be paid over 26 pay periods.

Our prorated compensation system ensures fair payment based on the actual number of days worked within each pay period.

For example, if an employee joins LEAD Public Schools in the middle of a pay period, the prorated amount is calculated based on the number of days worked. Let's say the pay period runs from May 15th to May 28th, and the employee starts on May 20th, working five days.

To calculate the prorated amount, we divide the employee's monthly salary by the number of working days in a full pay period. Assuming a monthly salary of \$2,000 and a standard pay period of ten working days, the daily rate would be \$200 ( $\$2,000 / 10$  days).

In case of termination, a prorated calculation will also be applied to ensure fair compensation for the days worked during the pay period. Deductions and withholdings will be adjusted accordingly.

Our commitment is to maintain transparency and fairness in our compensation practices, accurately reflecting employees' earnings based on the time they have worked

Summer pay is a benefit earned by school calendar employees who work until or are active on the final day of the school year. Failure to fulfill this requirement will result in the forfeiture of summer pay. This is not related for the extended school year (i.e. Summer School).

Eligible employees include teachers, administrators, and staff members hired based on the academic year schedule. To be considered "active," employees must engage in their assigned duties until the official conclusion of the school year, unless prior approval for absence is obtained. Verification of active status will be conducted, and appeals regarding summer pay forfeiture can be submitted within a specified timeframe.

This policy ensures transparency and accountability in the allocation of summer pay. It emphasizes the importance of working until or being active on the last day of school for eligibility. School calendar employees are responsible for complying with this requirement, and exceptions may be granted based on prior approval and exceptional circumstances. The policy will be periodically reviewed and amended as necessary, and employees will be promptly informed of any changes.

## **Payroll Deductions**

All required deductions, such as federal, state and local taxes and social security, and all authorized voluntary deductions, such as health insurance contributions, will be withheld automatically from your paychecks. Court-ordered wage assignments must be accepted and honored. If you have questions concerning deductions made from your paycheck or how they were calculated, contact Human Resources at [HRADP@leadpublicschools.org](mailto:HRADP@leadpublicschools.org).

## **Direct Deposit**

All employees are required to enroll in direct deposit during Onboarding in ADP. If employees want to make changes to their direct deposit information, it is recommended to do so at the beginning of a pay period to allow the new account to be active and able to accept the deposit. Making changes to the direct deposit account on or near payday could result in the funds not being deposited into the new account.

## **Time Keeping**

All non-exempt hourly employees are required to maintain time records that accurately reflect their actual hours worked and hourly rate. Recording incorrect or false information regarding actual hours worked is considered misconduct and may result in disciplinary action as provided in this handbook. All timesheets must be submitted and approved by the manager in ADP no later than Friday at 5 pm. Failure to meet this deadline may result in a delay of payroll processing of up to two weeks.

## Overtime

Non-exempt hourly employees are paid one and one-half times their regular hourly rate for all hours worked per week beyond 40. Overtime must be approved by a manager prior to working 40 hours. Exempt employees, including Teachers and Salaried Support employees, are not eligible for paid overtime.

## Salary Increases

Employee salaries are generally reviewed on an annual basis. In considering whether to increase salaries, LPS takes into account such factors as annual performance and budgetary parameters.

## W-2

W-2s will be issued to all employees by the IRS deadline (typically the last day of January following the tax year). It is the employee's responsibility to update his/her address on the ADP website to ensure receipt of the W-2.

## Expense Reimbursement

An expense reimbursement refers to the process of compensating individuals for their out-of-pocket expenses incurred while performing their job duties. Generally, LPS does not allow individual employees to claim expense reimbursements. Instead, LPS handles payments to vendors through methods such as purchase orders, purchasing cards, and standard invoicing. Reimbursements are only granted in exceptional circumstances, specifically for emergency expenses directly related to an employee's assigned responsibilities.

### **Eligible emergency expenses may include, but are not limited to:**

- Urgent travel expenses required for work purposes
- Emergency repairs or replacements of essential equipment needed for job performance
- Unforeseen medical expenses incurred during work-related activities
- Other emergency expenses approved by management on a case-by-case basis

Strictly Prohibited expenses may include, but are not limited to:

- Personal items
- Alcohol and tobacco products
- Non-work-related travel expenses
- Political contributions
- Gambling activities
- Gift cards

### **Requirements for Emergency Expense Reimbursements**

- Employees must submit their reimbursement requests within 10 business days from the date of purchase or occurrence of the emergency. Failure to submit within this timeframe will result in non-payment from LEAD Public Schools.
- A separate reimbursement form must be filled out for each receipt requiring reimbursement.
- To qualify for reimbursement, employees must attach detailed receipts to the reimbursement form. These receipts should provide the following information:
  - Date of the transaction
  - Vendor name and address
  - Description of the goods or services purchased
  - Amount paid
- Expense reimbursements are paid out on a set schedule determined by the company's payroll department. Reimbursements may not necessarily be processed on the next payroll cycle. Employees should consult their managers for the specific payout schedule.

### **Mileage Reimbursement**

A mileage reimbursement is a form of compensation provided to employees who use their personal vehicles for business-related travel. It is intended to cover the costs associated with operating and maintaining the vehicle, such as fuel, insurance, and general wear and tear. At LEAD Public Schools, we reimburse mileage expenses at the Federal rate, which is determined by the Internal Revenue Service (IRS).

### **Requirements for Mileage Reimbursements**

- Employees must submit their mileage reimbursement requests **MUST** be submitted by the 10th of the following month after the expense has been incurred. Failure to submit reimbursements within that timeframe will result in non-payment from LEAD Public Schools.
- A mileage log must be submitted with the mileage reimbursement log in order to be processed and to meet audit requirements.
- Mileage reimbursements are paid out on a set schedule from payroll and will not necessarily be processed on the next payroll. See your manager for the payout schedule.
- Mileage reimbursement does not include mileage traveling to/from your personal residence to campus locations.

## BENEFITS

### Overview

LEAD Public Schools strives to offer a competitive employment package, including a generous benefits package. Benefits are determined by an employee’s classification (see the “Understanding this Handbook” to determine which classification applies). Please refer to the section of the Employee Manual that refers to your classification. See the next page for a table that outlines the benefits available to all staff classifications. LPS reserves the right to change policies, carriers, and coverage levels from time to time. The details of each of the insurance benefits, including questions of coverage, eligibility and benefit levels, are set forth in the insurance policies and in explanatory booklets provided electronically to eligible employees.

Employee Class		All Full Time Staff
Core Benefits	Medical Insurance	UMR - United Healthcare
	Dental Insurance	Guardian
	Vision Insurance	Guardian (VSP)
Additional Benefits	Basic Life Insurance	Guardian
	Voluntary Life & AD&D	Guardian
	Short Term Disability	Guardian
	Long Term Disability	Guardian
	Flexible Spending Account	Discover Benefits/WEX
	Dependent Care Account	Discover Benefits/WEX
Employee Class		All Staff
Additional Benefits	Employee Assistance Plan	Guardian

Additional Benefits	Spring Health	Guardian
Additional Benefits	Accident Insurance, Voluntary Critical Illness, Voluntary Hospital Indemnity	Guardian
Retirement	TCRS (Hybrid or Legacy) Pension & 401(k) Plan	TCRS, Empower, American Funds
	LEAD Support 403(b) Plan	

Full time employees are employees working a minimum of 30 hours per week and are expected to work the entire school year. Full time employees are eligible for medical, dental and vision insurance at LEAD. Coverage is effective the first day of the month after your hire date of employment (for instance, if your start date is July 5th, your coverage would begin August 1st).

Employees have 30 days from their date of hire to elect coverage. All eligible employees must do so online through the ADP website. Late enrollment may cause certain coverage restrictions or denial of coverage until the next open enrollment period. Open enrollment for the plans occurs during the spring for a July 1st effective date.

LEAD Public Schools contributes towards benefits premiums; current rates will be provided annually to all eligible employees. The employee paid portion of benefits premiums are deducted on a pre-tax basis from an employee’s paycheck.

Open Enrollment is the time of the year in which employees are able to make benefits changes. Elections made during the new hire period or open enrollment will be final and cannot be changed until the next annual enrollment period unless an employee experiences a “qualifying life event” which includes the following:

- Birth or adoption of a child
- Marriage
- Divorce or legal separation



- Loss or gain of coverage through your spouse (e.g. your spouse switches from part-time to full-time and gains access to benefits)
- Loss of eligibility of a covered dependent
- Death of your covered spouse or child

Employees have 30 days from the “Qualifying Status Event” to notify Human Resources to make changes to current coverage. If employees fail to notify HR within 30 days of the qualifying life event, the next opportunity for a change to be made will be the following Open Enrollment period.

### **BENEFITS WHILE ON UNPAID STATUS:**

Employee health benefits will be continued in the same manner as received prior to the unpaid status. While benefits continue, employees will be responsible for repayment for the employee portion of the health insurance premium and in an amount equivalent to the expected period of absence. If the employee fails to return from unpaid status, the benefits may be terminated and the employee will be advised of COBRA continuation rights.

## **RETIREMENT**

### **Certified Staff (Teachers)**

All certificated employees in the role of teacher are automatically enrolled in the Tennessee Consolidated Retirement System (TCRS). Plan details vary depending on the date that an employee first made a contribution to TCRS, irrespective of employer at the time of the first contribution. Employees who made contributions prior to July 1, 2014 are classified as “Legacy Employees”; Employees who made their first contributions on or after July 1, 2014 are considered “Hybrid Employees”.

#### Legacy Employees

Legacy Employees contribute 5% and LPS contributes 6.81 of each paycheck to the pension fund (note that the employer portion is set by TN law and may periodically change). TCRS is a “defined benefit” retirement plan, which means that the amount of any future benefit will be determined by a benefit formula rather than by an account balance. For additional information on TCRS, please see <http://treasury.tn.gov/tcrs/index>.

In addition, employees may optionally contribute to the Empower 401(k) plan; however, LEAD Public Schools does not provide any matching funds for this plan. Please see the table below for contribution rates.

### Hybrid Employees

Hybrid Employees contribute 5% and LPS contributes 4% of each paycheck to the TCRS pension fund. TCRS is a “defined benefit” retirement plan, which means that the amount of any future benefit will be determined by a benefit formula rather than by an account balance. For additional information on TCRS, please see <http://treasury.tn.gov/tcrs/index>.

In addition, Hybrid are automatically enrolled in the 401(k) Defined Contribution Plan. Employees contribute 2% of each paycheck and LPS contributes 5% of each paycheck to the 401(k). Employees will automatically be enrolled in this plan unless they opt-out of the plan within 30 days of receiving enrollment letters. Please see the table below for contribution rates.

	Defined Benefit		Defined Contribution		Total Contributions	
	Pension		401(k)			
	Employee	LEAD	Employee	LEAD	Employee	LEAD
Legacy	5%	6.81%	Optional	no match	5% or more	6.81%
Hybrid	5%	4%	2% (unless opt out)	5%	7% (opt out: 5%)	9%

\*Contributions listed above are subject to change based on guidance received from the state of TN.

### Support Staff (Non-teachers & including hourly employees)

All Non-TCRS salaried employees are eligible to participate in the LPS 403(b) plan. The 403(b) plan is a defined contribution plan in which employees have the ability to choose between different investments for their payroll deductions.

### Employer Matching

Participants can make individual contributions to the plan through automatic payroll deductions of their eligible pay on a pretax basis. To assist employees in saving for their retirement, LPS provides a generous matching program in which LPS will contribute double the employee contribution for the first 3% an employee contributes. See the schedule below for matching details.

Employee Contribution	LEAD Matching Contribution	Total Contribution
1%	2%	3%
2%	4%	6%
3%	6%	9%
4%	6%	10%

5%	6%	11%
6% and higher	6%	Between 12% and 100%

## Vesting

100% of the Employee contributions are deposited into the Employee's account with each payroll period. However, the matching funds contributed to the plan are transferred to the Employee over time. At the one year anniversary of the employee's hire date, the employee will receive 33% of the designated matching funds; at the two year anniversary, the employee will receive an additional 33% and the final 34% will be transferred at the employee's three year anniversary. If an employee ends his or her employment with LPS, for any reason, the employee forfeits matching funds that have not yet been transferred.

For example, consider an employee who joins LEAD on 11/1/2018 and chooses to contribute 3% of his or her wages. This employee may begin contributing to his or her retirement on their first pay period. LEAD will match those funds at 6% of the employee's wages; however, LEAD will wait until the employee's second anniversary of 11/1/2020 to transfer funds into the employee's account. At this point, LEAD will put in 33% of the employee's matching funds. If this employee leaves in his or her second year, the employee will forfeit the remainder of the matching funds earned in the first year.

## ADDITIONAL BENEFITS

The following benefits are available to ALL employees:

### Employee Assistance Program

All employees (both exempt and non-exempt) are eligible for the Employee Assistance Program through Work life Matters. This program provides free, confidential assistance for the emotional health of employees, their spouses and children. Our EAP provides counseling, coaching, crisis intervention and community resource referrals.

To use this benefit 24/7, please call 1-800-386-7055. Or go online to:

[www.ibhworklife.com](http://www.ibhworklife.com)

Username: Matters

Password: wlm70101

## **Workers' Compensation**

If you experience a workplace injury while working at LEAD Public Schools, contact the Director of School Operations immediately and complete the LEAD's Workplace Incident Report. Once submitted, HR will email you detailed instructions on next steps. The Director of School Operations will advise the employee to follow Human Resources detailed instructions provided to the employee to ensure compliance with the workplace injury process. If this is a medical emergency dial 911.

If this is a non-medical issue, the employee should see the nurse if medical attention is needed. The school nurse is not a substitute for filling out the form nor is the school nurse evaluating whether or not a worker's compensation claim is needed. The injured staff member should notify their direct manager of the incident.

Failure to notify LEAD Public Schools of an on-the job injury in a timely manner may result in disciplinary action up to and including termination of employment. LEAD Public Schools may require staff to complete a drug/alcohol screening following a workplace incident.

## **Paid Time Off (PTO)**

Paid Time Off (PTO) is provided to offer employees with flexible time paid time off from work that can be used for such needs as vacation, personal, or family illness, doctor appointments or other activities. PTO is provided to all employees and is prorated based on budgeted hours worked. PTO will accrue per pay period and starts each year with the first payroll in July. If you are hired after July, PTO accrual will be prorated based on the table below. Paid leave time may be taken in half day increments (4 hours equals a "half day" and 8 hours equals a "full day").

Employees accrue their paid time off throughout the year; therefore, if an employee begins the school year late or leaves LEAD before the end of the school year, they will only accrue a portion of their eligible paid time off. Employees may not use unused paid time off during the last two weeks of their employment or to extend their termination date.

### **Accrual of PTO**

Full time, 40 hour a week, school year employees accrue PTO based on an annual accrual of 80 hours or 3.33 hours each pay period. For those working less than 40 hours, the accrual rate will be prorated based on scheduled work hours.

Full Time, 40 hours a week, Calendar Year Employees accrue PTO based on an annual accrual of 96 hours or 3.69 hours per pay period. For those working less than 40 hours, the accrual rate will be prorated based on scheduled work hours.

An employee can request no more than 40 hours if their PTO balance is less than 40 hours. The negative balance will replenish each pay period. If an employee reaches a balance of -40 hours and takes a day before that balance replenishes, that day must be taken as unpaid time off. If an employee leaves employment with a deficient PTO balance, this amount will be withheld from final pay.

If you are hired after the month of July, PTO accrual will be prorated based on the table below for school year and calendar year employees with the negative balance limits that employees can use during the school year.

Hired Month	School Year	Calendar Year	Negative Balance
7-1	80	96	-40
8-1	73.26	81.18	-40
9-1	66.6	73.8	-40
10-1	59.94	66.42	-40
11-1	53.28	59.04	-40
12-1	46.62	51.66	-40
1-1	33.3	44.28	-20
2-1	26.64	36.9	-20
3-1	19.98	29.52	-20
4-1	13.32	22.14	NA
5-1	6.66	14.76	NA
6-1	0	7.38	NA

All Paid Time Off must be requested through the ADP system. Employees should reach out directly to their manager with any questions regarding Paid Time Off eligibility or accrual.

Sick bank balances can only be accessed to meet the elimination period for a short term disability claim, maternity leave or FMLA. These balances would be exhausted before STD benefits are paid. Sick bank balances only pertain to employees hired prior to July 1, 2022.

Employees who are sick must notify their manager via phone prior to 6:00 am on the day(s) they will not be able to work due to illness, injury; however, as much advance notice as possible is encouraged. PTO used for scheduled medical or dental appointments must be approved 10 days in advance.

Where appropriate, the manager or Human Resources may request that the employee provide a doctor's note verifying the illness, injury, or appointment. Employees will be required to provide a doctor's note if:

- An employee takes a PTO day before or after a holiday, professional development day or during testing (MAP, TCAP, EOC, AP exams).
- An employee takes 3 consecutive PTO days due to a personal illness.

Failure to provide a doctor's note will result in the day being unpaid and may result in disciplinary action.

### **Approval of PTO**

PTO should be approved by the employee's manager at least 10 days in advance, unless PTO is being used for illness.

### **PTO Sell-Back**

Unused PTO remaining at the end of the year can be sold back with the first payroll of the following school year. Employees can sell back a maximum of 5 unused PTO days at a rate of \$100 per unused day. Unused PTO does not rollover. In order to be paid out, individuals must be employed with LEAD Public Schools at the time of the PTO payout.

### **Holiday and Break Policy**

All LEAD employees are eligible to observe paid holidays and breaks. Schools and offices will be closed during holidays and breaks. Occasionally, employees may need to work during breaks. Each employee should work directly with his or her manager to determine what tasks, if any, may be necessary to complete during school holidays or breaks.

Our goal is to have staff take time away from work during paid holidays and breaks. On rare occasions employees may need to work during break. In these instances where there is critical work with no other option, PTO will be provided in exchange for hours worked. However, this needs to be approved by Human Resources in advance.

### **Critical Days, Unapproved Absences, and/or Unapproved PTO.**

Critical Days are defined as periods of school/network operations where it is mandatory that employees report to work. Requests for PTO during critical days may be denied. Critical days are defined as the following:

- Professional Development Days
- TNReady testing days
- The day before and after a break or holiday. Holidays and breaks for the 23-24 school are:
  - New Year's Day
  - Martin Luther King
  - Good Friday
  - Spring Break
  - Memorial Day
  - Juneteenth Day
  - Independence Day
  - Labor Day
  - Fall Break
  - Veterans Day
  - Wednesday before Thanksgiving
  - Thanksgiving Day
  - Friday after Thanksgiving
  - Winter Break
  - Christmas Eve
  - Christmas Day

In addition to Critical Days, PTO requests may be denied when an employee's absence causes undue hardship to students, the school or the network, if an employee is requesting too much time off at once, if too many employees are out on a particular day and/or if proper notice is not given. If PTO has not been approved and the employee is still absent, the day will be unpaid and may be subject to disciplinary action.

If an employee is sick on a critical day, then the employee will be required to provide a doctor's statement. Failure to provide a doctor's statement may result in the employee not being paid for the time off.

The following will be declared official school holidays and/or breaks and all full-time and part-time salaried employees working at least 30 hours per week will be excused without charge to leave:

- New Year's Day
- Martin Luther King
- Good Friday
- **Spring Break**
- Memorial Day
- Juneteenth Day
- Independence Day
- Labor Day
- **Fall Break**
- Veterans Day
- Wednesday before Thanksgiving
- Thanksgiving Day
- Friday after Thanksgiving
- **Winter Break**
- Christmas Eve
- Christmas Day

Holidays that fall on Sunday will be observed on the following Monday and holidays that fall on Saturday will be observed on the Friday before by those employees working Monday through Friday.

### **Bring your Child to Work Policy**

This policy is established to avoid disruptions in job duties of the employee and co-workers, reduce personal and property liability, and help promote the learning environment of LEAD Public Schools Employees with dependent children are expected to make regular arrangements for proper care of their children while at work.

#### **PROCEDURES:**

- A. Employees and managers must consider issues of safety, confidentiality, disruption of operations, disruption of services, disruption to other employees, appropriateness, and legal liability, as well as sudden emergency, posed by the presence of children in the workplace. Therefore, employees are prohibited from bringing minor children on campus during working hours.
- B. As used in this policy, the terms "minor" and "children" are defined as any individual who has not reached the age of 18. For purposes of this policy, difficulty or inability in arranging childcare does not constitute an emergency.



- C. It is the responsibility of managers to ensure that the work of the campus is accomplished in an environment that promotes employee health and safety and minimizes work-related disruptions.
- D. It is inappropriate to allow workplace visits by children, whether supervised or unsupervised.
- E. Managers, with Head of Schools approval, may grant a one-time exception for a temporary, unforeseen emergency, but no parent or relative can have a child in the workplace without the manager's permission or use the workplace as an alternative to childcare or for any other purpose. When authorized, the accompanying adult must supervise the children at all times.
- F. Managers may direct an employee to remove a child from the workplace. In this event, the employee will be charged with leave for any time that he or she is absent from his/her assigned station. Managers may make exceptions for holiday parties and "Take Your Child to Work Day" with prior written approval from the Head of Schools and Chief Human Resources Officer.
- G. No minor may ever be allowed into an area that is potentially hazardous (i.e., where hazardous equipment, etc., are located); such prohibited areas include areas where chemicals are stored.
- H. Children exhibiting symptoms of potentially contagious illnesses should not be brought into the workplace. Provisions for sick children should be made within the context of various forms of leave available to staff: accrued PTO, unpaid time off, or approved FMLA. No child can be left unaccompanied by an adult in the workplace, and any employee who brings a child to the workplace and leaves him or her unattended in an office, room, hall, lounge, restroom, lunch area or elsewhere will be subject to discipline, up to and including termination.
- I. LEAD Public Schools computers are company property and vital equipment, intended for use only by employees in the course and scope of assigned duties. Computers are not to be used as a toy or entertainment for visiting children.
- J. Any exceptions to this policy must have prior written approval from the Head of Schools and Chief Human Resources Officer.
- K. LEAD Public Schools does not accept any liability for injuries to children who are on campus in violation of this policy.

## **Bereavement Policy**

In the event of a death in an employee's immediate family, a full-time employee shall be granted a reasonable paid absence of up to five (5) paid working days. For the purposes of bereavement leave, immediate family is defined to include the death of a spouse, domestic partner, parents, parents-in-law, children, step children, grandparents, grandchildren, legal guardian or dependents, siblings.

A full-time employee may also be granted one (1) paid work day for an extended family member. For the purposes of bereavement leave, extended family is defined to include the death of aunts, uncles, nieces, nephews, sister-in-law, brother-in-law of the employee.

For other losses of family members not listed above, the absence from work may be chargeable to an employee's paid time off balance.

Part-time and hourly employees are not entitled to bereavement leave.

Bereavement time may not be carried over into the next fiscal year, nor are employees compensated for unused time upon termination.

## **Jury Duty**

If an employee receives a summons for jury duty, the employee should present the summons to his or her manager immediately. In accordance with TN State Law, the employee may be entitled to continued compensation during the time the employee serves as a juror.

## **Voting Time**

All LEAD employees entitled to vote in national, state, or local elections shall, when necessary, be allowed sufficient time off with pay to exercise this right as determined by LEAD Public Schools. Employees are encouraged to vote before or after work hours, when possible.

## **Family Medical Leave Act Policy**

### **Purpose**

The purpose of this policy is to allow employees to balance their work and personal life by taking reasonable unpaid leave for certain family and medical reasons.

### **Policy Statement and Scope**

The Family Medical Leave Act (FMLA) allows employees to balance their work and personal life by taking reasonable unpaid leave for certain family and medical reasons. The FMLA seeks to accomplish these purposes in a manner that accommodates the legitimate interests of employers. It also seeks to minimize the potential for employment discrimination, while promoting equal employment opportunities for men and women. LEAD Public Schools intends at all times to comply with federal and state laws regarding family and medical leave.

Full-time employees who have been employed for at least a total of one (1) year and worked at least 1,250 hours during the immediately preceding 12-month period are eligible for FMLA leave, which is unpaid leave. Notwithstanding the above, employment prior to the last seven (7)

years is counted if the break is due to the employee's fulfillment of his/her National Guard or Reserve military obligation. Employees will be returned to the same or equivalent position upon their return from leave with the same pay and benefits if they return within the 12- or 26-week period, whichever is applicable (as explained below). For employees ineligible for FMLA leave, LEAD Public Schools (the Director of Human Resources and manager) will review business considerations and the individual circumstances involved when determining whether leave will be granted.

## Definitions

- **Employees:** All full-time employees of the LEAD Public Schools.
- **Child:** A biological, adopted or foster child, a stepchild, a child under legal guardianship, or the child of a person who is either under 18 years old or a dependent adult.
- **Intermittent or reduced leave:** Leave due to a serious health condition may be taken intermittently (in separate blocks of time due to a single health condition) or on a reduced leave schedule (reducing the usual number of hours worked per workweek or workday) if medically necessary. If FMLA leave is taken, PTO and FMLA leave will be taken concurrently unless and until the maximum PTO time has been exhausted. If the leave is unpaid, LEAD Public Schools will reduce salary based on the amount of time actually worked. In addition, while on an intermittent or reduced leave schedule, LEAD Public Schools may temporarily transfer the employee to an alternate position which better accommodates the recurring leave and which has equivalent pay and benefits. Requests for intermittent FMLA leave require special approval from the Human Resources Department and manager to meet our business needs.
- **Parent:** A biological, foster, adoptive parent, step-parent or legal guardian, but does not include an in-law.
- **Serious health condition:** LEAD Public Schools will grant leave for any condition defined as a serious health condition under the FMLA and/or any applicable state law. In general, a serious health condition requires continued medical treatment which causes incapacitation for a period of three (3) days or longer. Evidence of a medical disability must be provided by a qualified physician or other health care provider as defined under the FMLA.
- **Spouse:** An employee's current husband or wife as determined by the laws of the state in which the employee resides.
- **Twelve (12) month period:** The twelve (12) months preceding the date the leave is requested to begin.

## Procedure

Eligible employees are entitled to a total of twelve (12) weeks of unpaid leave during any rolling twelve (12) month period for any one or more of the following reasons:

1. the birth of a son or daughter or placement of a son or daughter with the employee for adoption or foster care, and to bond with the newborn or newly-placed child;
2. to care for a spouse, son, daughter, or parent who has a serious health condition, including incapacity due to pregnancy and for prenatal medical care;
3. for a serious health condition that makes the employee unable to perform the essential functions of his or her job, including incapacity due to pregnancy and for prenatal medical care
4. for any qualifying exigency arising out of the fact that a spouse, son, daughter, or parent is a military member on covered active duty or call to covered active duty status.

An exception applies in the case of married employees both employed by LEAD Public Schools in specific instances defined by federal law. Leave for the birth or placement of a child for adoption or foster care must be taken within 12 months of the birth or placement.

Eligible employees who are the parent, daughter, son, spouse, or next of kin of a covered military service member are entitled to a total of twenty-six (26) workweeks of leave during a 12-month period to care for the service member if the service member has a serious injury or illness incurred in the line of duty that makes the service member medically unfit to perform his/her military duties, and is undergoing medical treatment, recuperation, or therapy, or is otherwise on outpatient status, or is otherwise on the temporary disability retired list. The leave described in this paragraph, referred to as Military Caregiver Leave, is only available for a single 12-month period and is measured from the first day the employee takes leave until 12 months after that date. During a single 12-month period, an eligible employee is only entitled to a combined total of twenty-six (26) workweeks of leave for Military Caregiver Leave and any other FMLA-approved leave.

Eligible spouses who work for the same employer are limited to a combined total of 12 work weeks of leave in a 12-month period for the following FMLA-qualifying reasons:

- the birth of a son or daughter and bonding with the newborn child,
- the placement of a son or daughter with the employee for adoption or foster care and bonding with the newly-placed child, and
- the care of a parent with a serious health condition.

## Requesting Family Medical Leave:

- LEAD Public Schools' policy requires you to provide at least 30 days advance notice of your need by completing LEAD's FMLA Request Form for FMLA leave, including intermittent leave, unless 30 days' notice is not possible or the need for intermittent leave is unforeseeable or due to a qualifying exigency, in which case you must notify LEAD Public Schools as soon as possible. Requests for intermittent FMLA leave require special approval from the Human Resources Department and manager to meet our business needs.
- Additionally, the employee is required under the U.S. Department of Labor to file completed Certification of Health Care Provider for Employee's Serious Health Condition (FMLA) or Certification of Health Care Provider for Family Member's Serious Health Condition (FMLA) paperwork.
- Lastly, upon receiving special approval from the Human Resources Department and principal/manager, you are also required to report your intermittent leave hours in ADP for accurate exception time reporting. For accurate exception time reporting, employees must enter leave in ADP no later than 3 days after using intermittent leave. Failure to follow the LEAD's leave procedures, including receiving special approval for intermittent leave and/or exception time reporting procedures could result in denial of your intermittent FMLA time. Family leave is an unpaid leave. However, FMLA leave will be taken concurrently with PTO or other benefits, resulting in partially or fully-paid leave.
- In accordance with the Department of Labor, the Human Resources Department will issue the Notice of Eligibility and Rights and Responsibilities (FMLA) along with the Designation Notice (FMLA) within five (5) business days upon receipt of the Request Form and U.S. Department of Labor to submit Certification of Health Care Provider for Employee's Serious Health Condition (FMLA) or Certification of Health Care Provider for Family Member's Serious Health Condition (FMLA) paperwork.

### **Returning from Leave of Absence:**

Employees who return to work from FMLA for their own serious health condition must return to work with a fitness for duty (doctor's statement) by their physician. If the employee does not return to work with a fitness for duty (doctor's statement), then the employee will not be allowed to return to work until the employee can produce a statement, which clears him/her for work for their safety.

### **NOTICE REGARDING YOUR RIGHTS UNDER FMLA**

You are entitled to certain notices from LEAD Public Schools regarding your rights under the

FMLA. When you request FMLA leave, or when LEAD Public Schools acquire knowledge that benefits your leave may be for an FMLA qualifying reason, LEAD Public Schools will notify you whether or not your leave qualifies as FMLA leave within five business days absent extenuating circumstances. You will be provided a notice which will state whether or not you are eligible for FMLA leave and, if not, at least one reason why you are not eligible for FMLA leave. This notice will also detail what your rights and responsibilities are to LEAD Public Schools in order to qualify and take FMLA leave. Failure to comply with these responsibilities may adversely impact your eligibility for FMLA leave.

Once LEAD has received information sufficient to determine whether your requested leave qualifies under the FMLA (i.e., after receiving a medical certification from your healthcare provider) LEAD will notify you within five business days (absent extenuating circumstances) whether your leave will be designated and will be counted as FMLA leave. This notice will also inform you whether you will be required to present a fitness for duty certification in order to be restored to employment at the end of your leave. If known, this notice will also notify you of the number of hours, days or weeks that will be counted against your FMLA leave entitlement as a result of your leave. If it is not possible to know the amount of leave that will be required, you may request LEAD to provide you this information once in any 30-day period in which you have taken FMLA leave.

For the duration of your FMLA leave, LEAD Public Schools will maintain your health coverage under any applicable group health plan on the same basis as coverage would have been provided if you were not on leave. As a result, you are responsible for your portion of your insurance premium while you are on leave. Your use of FMLA leave will not result in the loss of any employment benefit that accrued prior to the start of your leave.

### **Nondiscrimination**

We are required to advise you that the FMLA makes it unlawful for any employer to interfere with, restrain, or deny the exercise of any right provided under the FMLA, or to discharge or discriminate against any person for opposing any practice made unlawful by the FMLA or for involvement in any proceeding under or relating to FMLA.

The U.S. Department of Labor is authorized to investigate and resolve complaints of any violation of the FMLA. In addition, an eligible employee may bring a civil action against an employer for violations. The FMLA does not affect any Federal or State law prohibiting discrimination, or supersede any State or local law or collective bargaining agreement which provides greater family medical leave rights.

### **RETURN FROM UNPAID STATUS:**

### **Procedure for returning from unpaid status:**

An employee who has been granted an unpaid status shall give their manager reasonable notification of the intent to return to work at least two weeks prior to the return date with a fitness for duty (doctor's statement) from their physician. If the employee does not return to work with a fitness for duty (doctor's statement), then the employee will not be allowed to return to work until the employee can produce a statement, which clears him/her for work for their safety. Upon receiving notification of the employee's availability, the manager or Human Resources will arrange to have the employee reinstated to the employee's previous position, if available. If the previous position is no longer available, the employee may be considered for other open positions which the employee is qualified for as they become available.

If no position exists, any obligation to reinstate the employee is discontinued and the employee's unpaid status is changed to a voluntary termination. Future reemployment would be as a rehire with only legally required reinstatement of applicable benefits.

## **Parental Leave Policy**

### **Purpose of Policy**

LEAD Public Schools (LPS) recognizes the incredible life milestone expanding your family through the birth, adoption or foster placement of a child. Therefore, the purpose of this policy is to help minimize the financial burden employees face when taking a leave of absence to care for and bond with the child. PTO

### **Policy Scope**

This policy applies to all full-time benefit eligible employees that have been employed with LPS for the last (12) consecutive months or longer. Nothing in this policy provides any contractual rights regarding employee benefits, nor does anything in this policy alter or modify the employment-at-will relationship between LPS and its employees.

### **Policy Statement**

In order to assist and support new parents in balancing work and family, LPS provides Eligible Employees with a period of Parental Leave for activities related to the birth, bonding, care, and well-being of their newborn or newly adopted or fostered child(ren).

#### **A. Parental Leave - Maternity**

Eligible employees will receive a total of (16) weeks of paid leave ((12) weeks for recuperation for activities related to childbirth and an additional (4) weeks for bonding commencing with the date of birth of the child. LPS will supplement an employee's regular base pay after the following conditions are met.

- All eligible accrued time off balances are paid.
- All LPS observed holidays and breaks that occur during the leave are paid.

**B. Parental Leave – Birth, Adoption and Foster Placement** Eligible Employees will receive a total of (4) weeks for bonding and care following the birth, adoption or placement of a child(ren). LPS will supplement an employee’s regular base pay after the following conditions are met.

- All eligible accrued time off balances are paid.
- All LPS observed holidays and breaks that occur during the leave are paid.

**C. Timing of Leave and Amount of Leave**

Eligible Employees must utilize this benefit consecutively commencing with the birth, adoption, foster placement or pregnancy related medical reasons that require leave prior to birth based on the entitlement outlined above. Intermittent leave requests will not be eligible for this paid benefit. In the maternity event that both parents/partners are employees of LPS, leave entitlement will be based on primary versus secondary designation.

Eligible Employees may utilize one term of Parental Leave per birth or adoption event within a (12) month period. For purposes of this policy, an event is defined as a delivery, adoption or foster placement of a child(ren).

Example:

- If an Eligible Employee has a delivery of multiple newborns or adopts multiple children at the same time, the employee would be eligible for one term of Parental Leave for that event.

**D. Coordination with Other Statutes**

Parental Leave taken under this policy shall run concurrently with leave under the Family Medical Leave Act (FMLA) or any other state or local law that may provide greater family and medical leave rights than those provided by federal law.

Example:

- When Parental Leave taken under this policy falls under the definition of circumstances qualifying for leave under the FMLA, the Parental Leave will be



counted against the employee's 12-week FMLA leave entitlement. Employees should refer to LPS Policy – Family and Medical Leave (FMLA).

In all circumstances in which federal, state, or local law provides for greater family and medical leave rights than this policy, LPS will comply with those laws.

#### **E. Approval Process**

In order to utilize Parental Leave, all Eligible employees must notify their direct manager as soon as the employee becomes aware of such a leave but no less than 30 days. The employee must log into the ADP system under Human Resources and submit a request for Family Medical Leave and notify Human Resources in writing at [hradp@leadpublicschools.org](mailto:hradp@leadpublicschools.org). An employee's failure to comply with leave procedures may delay or result in the denial of Parental Leave.

Documentation of child placement must be presented to the Human Resources Department at [hradp@leadpublicschools.org](mailto:hradp@leadpublicschools.org) at the time of requesting Parenting Leave for approval in adoption and foster placement events.

#### **Definitions**

- **Eligible Employee:** A benefit-eligible employee who is a natural parent, same-sex partner, or adoptive parent following the birth, adoption or foster placement of a child that is under the age of 18. An employee who adopts a spouse or partner's child(ren) is not considered an Eligible Employee for purposes of this policy.
- **Parental Leave:** A period of paid leave for the purpose of providing Eligible Employees additional financial consideration during the time to bond with a newborn or with a newly adopted or fostered child under the age of 18.
- **Holidays:** The observed holidays as outlined on the school year calendar. Typically, Fourth of July, Labor Day, Veteran's Day, Thanksgiving Day, Christmas Day, New Year's Day, Martin Luther King Day, Good Friday, Memorial Day and Juneteenth Day.
- **Breaks:** The observed weeks for Fall Break, Winter Breaks, Spring Break, and Summer Break. The observed breaks that apply will be based on your status as a school year or calendar year.

#### **Contact for Questions**

Any questions regarding this policy or procedure may be directed to the Human Resources Department at [hradp@leadpublicschools.org](mailto:hradp@leadpublicschools.org).

## Military Leave Policy

### Purpose

Employees who volunteer or are involuntarily called to serve in the ranks of the military may request a leave of absence for the duration of their Military Service. The Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA) covers all private and public employers. USERRA provides for military leaves of absence and reemployment of eligible Employees when they return from military leave for all Uniformed Services.

### Policy Statement and Scope

Policy Statement: LEAD Public Schools fully supports both the letter and spirit of USERRA regulations so that our Employees and their families have peace of mind during the Employee's active service.

Scope: This policy applies to all salaried full-time Employees.

### Definitions

- **Employees:** All officers and salaried full-time Employees of LEAD Public Schools.
- **Military Service:** Active duty, active and inactive duty training, and such activities as funeral honors duty performed by National Guard or reserve members. Examples of military leave include, but are not limited to, the following: reserve or National Guard encampment attendance, maneuvers, drills, training programs, state or national emergency, state of war or actual war.
- **Uniformed Services:** As defined by USERRA include the following:
  - The full-time and reserve components of the Army, Navy, Marine Corps, Air Force and Coast Guard;
  - The National Guard;
  - The Commissioned Corps of the Public Health Service; and
  - Any other category of persons designated as a uniformed service by the President in time of war or national emergency.

### Procedure

- A. **Pay and Benefits:** LEAD Public Schools will continue to compensate the employee for a period of six months. Income received from the military will be deducted from the Employee's current pay after the 10th business day of the military leave. Also, the following benefits will be reduced by any primary benefits payable to Employees and their dependents by or on behalf of the United States government.

Upon approval of the leave, the employee will have the option to continue paying for their medical, dental and vision benefits, or discontinue coverage and suspend their contributions and utilize their military benefits only. Employees should communicate in writing to the Human Resources Specialist if they choose to discontinue LEAD's benefits prior to deployment, otherwise LEAD Public Schools will assume continuation of benefits with LEAD Public Schools and deductions will be deducted from the Employee's paycheck for the first six months. After the sixth month period, Employees will be responsible for submitting premium payments for the duration of the military leave. These payments should be sent to the attention of LEAD's Human Resources Specialist.

In the event of the Employee's death, all benefits will cease and LEAD Public Schools will offer COBRA to any existing covered dependents.

Life insurance and accidental death and dismemberment will continue for the duration of the Military Service, subject to any exclusion in the insurance policy agreement.

401(k) and 403 (b) deductions will continue to be withheld from pay unless the Employee elects to change the deduction with the 401k provider and 403 (b) provider. Immediately upon reemployment, the Employee may, at the Employee's election, make any or all Employee contributions that the Employee would have been eligible to make had the Employee's employment not been interrupted by Military Service. Such contributions must be made within a period that begins with the Employee's reemployment and that is not greater in duration than three times the length of the Employee's Military Service. Employees will receive all associated LEAD Public School matches for such contributions.

Spending account deductions will continue for six months unless the employee notifies the Human Resources Specialist in writing to suspend deductions. You may continue to submit claims through March 31 of the next year for only those expenses you incur through the date you suspend deductions.

Short-term illness and long-term disability and the business benefits all cease on the first day of an approved military leave of absence.

Retirement plans - Credit for service (i.e., time counted for eligibility of benefits) and benefit service will be treated as though the Employee had been continuously employed during the military leave.

Paid time off (PTO) will stop accruing the first full pay period following the military leave and begins again on the first full pay period when the Employee returns to work.

The Employee's performance review dates, related merit increases and incentives will not be impacted by the military leave.

Service credit for the retirement plans, 401(k), 403 (b), and PTO accrual will be applied for all time spent in the military upon reinstatement.

**B. Requesting a Military Leave of Absence:** A Request for a Military Leave of Absence can be submitted in writing to the Human Resources Department and immediate manager. The appropriate documentation should be attached to the written request and submitted to the Human Resources Department and immediate manager (i.e., orders and a copy of the employee's military paycheck, if called to active duty). If the employee chooses to utilize military benefits only, and discontinue LEAD Public School's benefit coverage and/or suspend contributions, please notify the Human Resources Specialist. No notice is required if doing so is impossible, unreasonable, or precluded by military necessity.

**C. Replacing Employees on Leave Under USERRA.** Returning Employees must be reemployed in the current position as if they had remained continuously employed. If reemployment in such a position is not possible, they must be reinstated in a position of equivalent pay and seniority to the position they otherwise would have returned. If a replacement is needed, temporary help may be utilized while the Employee is on military leave.

**D. Returning from Leave Reinstatement.** After military leave is governed by federal law in effect at the time of the leave. In no case shall the return policy for those on military leave be less than the policy for any other type of leave of absence. Employees returning from Military Service of 30 calendar days or less must report to work at the start of the next work period, allowing eight hours for travel after the end of service. Employees returning from Military Service of 31 to 180 calendar days must apply for reinstatement within 14 calendar days of concluding service. Those serving longer than 180 calendar days must apply for reinstatement within 90 calendar days of ending Military Service. The Employee must communicate their request for reinstatement in writing to the Human Resources Department within the above time frames.

Exceptions to these deadlines are possible when circumstances beyond an Employee's control prevent returning to work or applying for reinstatement within the specified period. Extensions also are permitted when Employees require convalescent time after

Military Service. In all other cases, Employees who fail to report to work or apply for reinstatement within the specified period are subject to LEAD Public School's disciplinary policy for unexcused absences.

The law also protects returning veterans from discharge, except for cause, for six months after they serve 30 to 181 calendar days. Employees who serve more than 181 calendar days cannot be discharged, except for cause, for one year after their return to work.

Federal legislation governing the reemployment rights of persons called to active military duty is subject to change, and many provisions are subject to varying interpretations. The procedural summary may not, therefore, state the law as it may apply to a particular set of facts, or at some time in the future.

The manager must notify the Human Resources Department upon the Employee's return from military leave of absence.

### **Contact for Questions**

Any questions regarding this policy or procedure may be directed to [hradp@leadpublicschools.org](mailto:hradp@leadpublicschools.org).

## **Transfer Policy and Job Change Policy**

LEAD Public Schools (LPS) guidelines for internal transfer and job change are outlined below. It is important to note consideration for an internal transfer and/or job change are based on network needs and are at the discretion of the appropriate Head of Schools under consultation with LPS school managers. Talent will work closely with School leadership in cross referencing each request with available vacancies.

**Note:** When requesting a transfer or job change at the same school, employees should go directly to their manager. The process steps below do not apply.

### **Internal Transfer:**

An internal transfer is defined as a school-based employee seeking to move from one school to another in the same job position.

*Eligibility:*

- Satisfactory rating on the most recent performance management review or TEAM evaluation and in good employment standing (not on PIP or corrective action, not being dismissed from employment).
- Employed with LEAD Public Schools for 12 months.
- Provide a valid reason for the transfer request.

*Process:*

- Speak with your immediate manager regarding your request to transfer. At this time, you will discuss a valid reason for the transfer request. Your manager can approve or deny the request.
- If approved, discuss with your manager which LEAD campus you would like to transfer to.
- Manager will notify the talent team that the transfer has been approved.
- Log into ADP. Go to Myself → Talent → Career Center and apply for the position.
- A member of the talent team will reach out to discuss next steps.

**Job Posting: Transfer**

A job posting is defined as an employee seeking a new position within the LEAD network. A new position is defined as one with a different title than the current position.

*Eligibility:*

- Satisfactory rating on the most recent performance management review or TEAM evaluation and not on a Performance Improvement Plan (PIP).
- Employed with LEAD Public Schools for 12 months.

*Process:*

- Speak with your immediate manager regarding your desire to pursue a job change and whether you meet the eligibility criteria.
- Your manager will discuss open positions within the network.
- Manager will make the talent team aware of the conversation.
- Log into ADP. Go to Myself → Talent → Career Center and apply for the position.
- A member of the talent team will reach out to discuss next steps.

\*\*In both cases (internal transfer and job change) management reserves the right to forgo eligibility criteria if the transfer or job change is part of a development opportunity or succession plan.

## **Recording Policy**

### **Purpose**

The purpose of this policy is to protect the confidential and proprietary information of LEAD Public Schools, our students and families, and the freedom of our employees to communicate freely.

### **Policy Statement and Scope**

**Policy Statement:** LEAD Public Schools fully supports the confidentiality of our staff, students, and families. LEAD must comply with the Family Educational Rights and Privacy Act (FERPA) as well as other state and federal privacy laws. This compliance requires protecting confidential student education records and information from release, including protecting that information from video or tape recordings.

**Scope:** This policy applied to all Employees of LEAD Public Schools.

### **Procedure**

In order to maintain confidentiality with all information and records, no person, including but not limited to employees, visitors, clients, vendors, or a representative acting on behalf of LEAD Public School, should record conversations of another without his or her prior knowledge and consent. Recordings include audio and/or video, by any means including smart phones. The devices used to record via audio or video that are prohibited are inclusive of, but are not limited to, phones, voice recorders of any kind, video cameras of any kind, and microphones. Any individual requesting to record via audio or video any interaction with any persons associated with LEAD Public Schools, will need to inform LEAD Public Schools Human Resources Department of their intention and obtain authorization. LEAD Public Schools reserve the right to refuse such requests, in their sole discretion. Furthermore, a LEAD Public School employee may refuse to be recorded and at such time may end the conversation if the asking party refuses to speak without a recording device.

Nothing in this policy is intended to prevent LEAD Public Schools employees from making recordings for security purposes, monitoring work performance or any other legitimate activity related to the safety and work of the school or network or as otherwise protected by law. A violation of this policy may result in disciplinary action, up to and including termination.

**Contact for Questions**

Any questions regarding this policy or procedure may be directed to [hradp@leadpublicschools.org](mailto:hradp@leadpublicschools.org).

**ACKNOWLEDGMENT FORM**

I acknowledge that I have access to the Employee Manual on-line, which describes important information about LEAD Public Schools and understand that I should consult the Chief Human Resources Officer if I have any questions. I understand that this Policy has been provided to me electronically and that I may request a hard copy of this Policy at any time.

I understand that any manuals, handbooks or other personnel-related material I may receive from LEAD, such as this Policy, may be modified at any time, and does not constitute a contract of employment. This Policy supersedes any prior practices and oral or written statements. I understand that this Policy is the property of LEAD Public Schools and is for internal use only. **I have received the LEAD Public Schools Employee Manual, and I understand that it is my responsibility to read and comply with the policies contained in this handbook and any revisions made to it.**

-----  
EMPLOYEE NAME (please print legibly)

-----  
EMPLOYEE SIGNATURE

-----  
DATE





J. 23-24 Approved Budget and 24-25 Projected Budget

**Current Approved Budget (2023-2024)**

**Revenue Assumptions**

		Current Approved Budget		Assumption Notes
		2023-2024		
ACTUAL Enrollment		236		
<b>State Revenues</b>	<b>Rate/Assumption</b>			<b>Assumption Notes</b>
TISA Revenues	\$16,500	\$3,894,000		See Narrative for Assumptions
TAG	\$365	\$86,246		See Narrative for Assumptions
<b>Federal Revenues</b>				
Title I	\$1,339	\$315,913		See Narrative for Assumptions
Title II	\$87	\$20,641		See Narrative for Assumptions
IDEA	\$292	\$68,846		See Narrative for Assumptions
ESSER, Facilities Grant, ISM Grant, TSL	\$4,443	\$1,048,585		See Narrative for Assumptions
<b>School Activity Revenues</b>				
Other	\$0	\$0		
<b>Fundraising &amp; Philanthropy</b>				
Other	\$0	\$0		
<b>Total Revenues</b>		<b>\$5,434,231</b>		

**Expense Assumptions**

		Current Approved Budget		Assumption Notes
		2023-2024		
Annual Expense Increase		0.00%		
Cumulative Increase		100.00%		
<b>Personnel (Wages, Taxes, and Benefits)</b>	<b>46 FTE</b>	<b>\$3,071,517</b>		
Instructional	\$0	\$347,305		Includes Professional Development, Instructional Materials, Data and Assessment, ExEd Contract Services, Staff Recognition, and Staff Recruitment
Student Support	\$0	\$57,432		Includes Student Recognition and Family Engagement
School Operations	\$0	\$340,930		Includes Athletics, Office Supplies, Nursing, Security, Technology, and Phones
Transportation	\$0	\$361,065		Based on Current Routes
Facilities	\$0	\$703,054		Rent, Utilities, Custodial, and Repairs and Maintenance
Authorizer Fee	\$0	\$97,350		2.5% per ASD
Management Fee		\$350,460		9% Management Fee
<b>Total Expenses</b>		<b>\$5,329,113</b>		
<b>EBITDA</b>		<b>\$105,118</b>		

## New Charter School Application Budget Template Year 1-2 Staff Assumptions

### FTE Assumptions

	Year 1 2024-25	Year 2 2025-26
Fiscal Year	2024-25	2025-26
Enrollment	230	265
# of Classes	12	12
<b>Administrative Staff</b>		
Principal/School Leader	1.00	1.00
Assistant Principal	2.00	2.00
<b>Total Administrative FTE</b>	<b>3.00</b>	<b>3.00</b>
<b>Instructional Staff</b>		
Teachers	12.00	12.00
Special Education Teachers	3.00	3.00
Para	2.00	2.00
Other (Specify in Assumptions)	10.00	10.00
<b>Total Instructional FTE</b>	<b>27.00</b>	<b>27.00</b>
<b>Non-Instructional Staff</b>		
Clerical Staff	1.00	1.00
Operations	1.00	1.00
Social Workers/Counseling	1.00	1.00
Other (Specify in Assumptions)	3.00	3.00
<b>Total Non-Instructional FTE</b>	<b>6.00</b>	<b>6.00</b>
<b>Total FTE</b>	<b>36.00</b>	<b>36.00</b>

### Compensation Assumptions

	Year 1 2024-25	Year 2 2025-26	
<b>Annual Increase</b>	0.00%	4.50%	
<b>Cumulative Increase</b>	100.00%	104.50%	
<b>Administrative Staff</b>	<b>Base Assumption</b>		<b>Assumption Notes</b>
Principal/School Leader	\$112,200	112,200	All staffing is based on expected staffing model with average salaries, plus annual wage increases
Assistant Principal	\$84,700	169,400	
<b>Total Administrative Compensation</b>	<b>281,600</b>	<b>294,272</b>	
<b>Instructional Staff</b>			
Teachers	\$61,300	735,600	Includes 2 Instructional Managers, 4 Reading Interventionist, 1 Long Term Substitute, 2 Math Interventionist, 1 Diverse Populations
Special Education Teachers	\$53,500	160,500	
Para	\$37,500	75,000	
Other (Specify in Assumptions)	\$62,000	620,000	
<b>Total Instructional Compensation</b>	<b>1,591,100</b>	<b>1,662,700</b>	
<b>Non-Instructional Staff</b>			
Clerical Staff	\$45,000	45,000	Front Office Staff
Operations	\$69,000	69,000	Director of Operations
Social Workers/Counseling	\$55,500	55,500	Counselors
Other (Specify in Assumptions)	\$46,300	138,900	2 Student Support Coordinator and 1 Family Engagement Coordinator

**New Charter School Application Budget Template  
Year 1-2 Staff Assumptions**

<b>Total Non-Instructional Compensation</b>	308,400	322,278	
<b>Bonus</b>	38,000	39,520	Bonus based on performance in various network priorities
<b>Total Personnel Wages</b>	2,219,100	2,318,770	

**Employer Benefits & Tax Assumptions**

		Year 1 2024-25	Year 2 2025-26	
	<b>Base Assumption</b>			<b>Assumption Notes</b>
Social Security	6.20%	\$137,584	\$143,764	
Medicare	1.45%	\$32,177	\$33,622	
State Unemployment	\$400 per employee	\$14,400	\$14,400	
Disability/Life Insurance	0.19%	\$4,216	\$4,406	Life and AD&D
Workers Compensation Insurance	0.29%	\$6,435	\$6,724	Adjusted for staffing and based on current contribution rates
Other Fringe Benefits	0.02%	\$444	\$464	LTD
	<b>Health Insurance</b>			
	<b>Annual Increase</b>	0.00%	5.00%	
	Cumulative Increase	100.00%	105.00%	
Medical Insurance	\$4,410	\$158,760	\$166,698	Adjusted for staffing and based on current contribution rates
Dental Insurance	\$331	\$11,916	\$12,512	Adjusted for staffing and based on current contribution rates
Vision Insurance	\$110	\$3,960	\$4,158	Adjusted for staffing and based on current contribution rates
TCRS Certified Legacy		\$30,836	\$32,377	Adjusted for staffing and based on current contribution rates
TCRS Certified Hybrid		\$35,930	\$37,727	Adjusted for staffing and based on current contribution rates
Other Retirement		\$16,428	\$17,250	Adjusted for staffing and based on current contribution rates
<b>Total Taxes and Benefits</b>		<b>\$453,087</b>	<b>\$474,101</b>	
<b>Total Personnel</b>		<b>\$2,672,187</b>	<b>\$2,792,871</b>	

## Charter School Renewal Year 1 Budget (23.24SY)

### Revenue Assumptions

<b>Enrollment</b>	<b>230</b>	
<b>State Revenues</b>	<b>Rate/Assumption</b>	
TISA Revenues	\$16,900	3,887,000
TAG	\$376	86,575
<b>Federal Revenues</b>		
Title I	\$1,339	307,881
Title II	\$87	20,116
IDEA	\$292	67,096
TSL Grant	\$0	375,000
<b>School Activity Revenues</b>		
Other	\$0	-
<b>Fundraising &amp; Philanthropy</b>		
Other	\$0	-
<b>Total Revenues</b>		<b>4,743,668</b>

### Compensation

#### Administrative Staff

Principal/School Leader	1.00	112,200
Assistant Principal	2.00	169,400
<b>Total Administrative Compensation</b>	<b>3.00</b>	<b>281,600</b>

#### Instructional Staff

Teachers	12.00	735,600
Special Education Teachers	3.00	160,500
Educational Assistants/Aides	2.00	75,000
Other (Specify in Assumptions)	10.00	620,000
<b>Total Instructional Compensation</b>	<b>27.00</b>	<b>1,591,100</b>

#### Non-Instructional Staff

Clerical Staff	1.00	45,000
Operations	1.00	69,000
Social Workers/Counseling	1.00	55,500
Other (Specify in Assumptions)	3.00	138,900
<b>Total Non-Instructional Compensation</b>	<b>6.00</b>	<b>308,400</b>

<b>Performance Based Leadership Bonus</b>		<b>38,000</b>
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**Charter School Renewal  
Year 1 Budget (23.24SY)**

<b>Total Compensation</b>	<b>2,219,100</b>
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**Employer Benefits & Taxes**

Social Security	137,584
Medicare	32,177
State Unemployment	14,400
Disability/Life Insurance	4,216
Workers Compensation Insurance	6,435
Other Fringe Benefits	444
Medical Insurance	158,760
Dental Insurance	11,916
Vision Insurance	3,960
TCRS Certified Legacy	30,836
TCRS Certified Hybrid	35,930
Other Retirement	16,428
<b>Total Employer Benefits &amp; Taxes</b>	<b>453,087</b>

**Operating Expenses**

**Contracted Services**

Professional Development		24,735
Copier Lease and Usage		24,658
Health Services		65,481
Transportation	\$361,065	375,508
IT Services		5,000
Contracted SPED Services		45,833

**Supplies & Materials**

Textbooks and Instructional Supplies		74,342
Student Supplies		20,320
Testing & Evaluation		3,203
Office Supplies		20,320
Printing Paper		11,000
Gifts & Awards - Students		24,447
Gifts & Awards - Teachers and Staff		15,300

**Facility Related Expenses**

Rent		277,378
Utilities		177,635
Custodial		252,189

**Charter School Renewal  
Year 1 Budget (23.24SY)**

Tenant Improvements		103,270
Other		35,000
<b>Other Charges</b>		
Student Recruitment & Community Engagement		15,113
Authorizer Fee		116,610
Other		349,830
<b>Debt Service</b>		
Other		-
<b>Total Operating Expenses</b>		<b>2,037,171</b>
<b>Total Expenses</b>		<b>4,709,358</b>
<b>EBIDTA</b>		<b>34,310</b>

**Charter School Renewal Application  
Year 2**

**Revenue Assumptions**

		Year 1		Year 2	
		2024-25		2025-26	
		230		265	
<b>Enrollment</b>					
<b>State Revenues</b>					
TISA Revenues	\$16,900	3,887,000	4,478,500	3% increase from prior year, adjusted for enrollment	
TAG	\$376	86,575	99,749	0% increase from prior year, adjusted for enrollment	
<b>Federal Revenues</b>					
Title I	\$1,339	307,881	354,733	0% increase from prior year, adjusted for enrollment	
Title II	\$87	20,116	23,177	0% increase from prior year, adjusted for enrollment	
IDEA	\$292	67,096	77,306	0% increase from prior year, adjusted for enrollment	
TSL Grant	\$0	375,000	375,000	same as prior year	
<b>School Activity Revenues</b>					
Other	\$0	-	-		
<b>Fundraising &amp; Philanthropy</b>					
Other	\$0	-	-		
<b>Total Revenues</b>		<b>\$4,743,668</b>	<b>\$5,408,465</b>		

**Compensation**

		Year 1		Year 2	
		2024-25		2025-26	
<b>Principal/School Leader</b>					
Principal/School Leader		112,200	117,249	see staffing assumptions for Year 1 and 2 for details	
Assistant Principal		169,400	177,023		
<b>Total Administrative Compensation</b>		<b>281,600</b>	<b>294,272</b>		
<b>Instructional Staff</b>					
Teachers		735,600	768,702		
Special Education Teachers		160,500	167,723		
Educational Assistants/Aides		75,000	78,375		
Other (Specify in Assumptions)		620,000	647,900		
<b>Total Instructional Compensation</b>		<b>1,591,100</b>	<b>1,662,700</b>		
<b>Non-Instructional Staff</b>					
Clerical Staff		45,000	47,025		
Operations		69,000	72,105		
Social Workers/Counseling		55,500	57,998		
Other (Specify in Assumptions)		138,900	145,151		
<b>Total Non-Instructional Compensation</b>		<b>308,400</b>	<b>322,278</b>		
<b>Bonus</b>		<b>38,000</b>	<b>39,520</b>		
<b>Total Compensation</b>		<b>2,219,100</b>	<b>2,318,770</b>		

**Employer Benefits & Taxes**

		Year 1		Year 2	
		2024-25		2025-26	
<b>Assumption Notes</b>					
Social Security		137,584	143,764		
Medicare		32,177	33,622		
State Unemployment		14,400	14,400		
Disability/Life Insurance		4,216	4,406		
Workers Compensation Insurance		6,435	6,724		
Other Fringe Benefits		444	464		
Medical Insurance		158,760	166,698		
Dental Insurance		11,916	12,512		
Vision Insurance		3,960	4,158		
TCRS Certified Legacy		30,836	32,377		
TCRS Certified Hybrid		35,930	37,727		



**Charter School Renewal Application  
Year 2**

Other Retirement	16,428	17,250	
<b>Total Employer Benefits &amp; Taxes</b>	<b>453,087</b>	<b>474,101</b>	

**Operating Expenses**

	Annual Expense Increase	
	Year 1	Year 2
	2024-25	2025-26
	0.00%	1.00%

Contracted Services	Assumption Notes		
Professional Development	24,735	24,982	1 % increase from prior year
Copier Lease and Usage	24,658	24,904	1 % increase from prior year
Health Services	65,481	66,136	1 % increase from prior year
Transportation	375,508	390,528	4 % increase from prior year
IT Services	5,000	5,050	1 % increase from prior year
Contracted SPED Services	45,833	46,291	1 % increase from prior year
Textbooks and Instructional Supplies	74,342	75,085	1 % increase from prior year
Student Supplies	20,320	20,523	1 % increase from prior year
Testing & Evaluation	3,203	3,235	1 % increase from prior year
Office Supplies	20,320	20,523	1 % increase from prior year
Printing Paper	11,000	11,110	1 % increase from prior year
Gifts & Awards - Students	24,447	24,691	1 % increase from prior year
Gifts & Awards - Teachers and Staff	15,300	15,453	1 % increase from prior year
Rent	277,378	280,152	See Narrative for Assumptions
Utilities	177,635	179,411	1 % increase from prior year
Custodial	252,189	254,711	1 % increase from prior year
Tenant Improvements	103,270	104,302	1 % increase from prior year
Other	35,000	35,350	1 % increase from prior year
Student Recruitment & Community Engagement	15,113	15,264	1 % increase from prior year
Authorizer Fee	116,610	134,355	Authorizer Fee @ 3%
Other	349,830	403,065	Management Fee @ 9%

<b>Debt Service</b>			
Other	-	-	

<b>Total Operating Expenses</b>	<b>2,037,171</b>	<b>\$2,135,123</b>	
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<b>Total Expenses</b>	<b>4,709,358</b>	<b>\$4,927,994</b>	
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<b>EBIDTA</b>	<b>\$34,310</b>	<b>\$480,471</b>	
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## K: Budget Narrative

*As Attachment K, present a budget narrative including detailed descriptions of budget assumptions, and revenue and expenditure projections. The narrative must include:*

- (a) Why the school's financial performance warrants continued authorization under the Commission;

In addition, LEAD has strong financial management. LEAD has received an unqualified opinion (clean opinion) from outside auditors each year of its existence, and has had multiple years of budget surpluses, all of which have resulted in a strong cash position that provides a strong foundation for any future facilities needs. LEAD has met financial compliance expectations, including submitting annual budgets and audited financial statements to authorizers and the state in a timely fashion.

- (a) An explanation of student enrollment and TISA projections;

The anticipated budgeted enrollment for Brick Church in the 2023-2024 academic year was initially set at 236, but the current enrollment has exceeded expectations, reaching 249 students. Looking ahead to the 2024-2025 school year, we anticipate a temporary decrease in enrollment to 230 as we launch our new charter, followed by a gradual rebound and expansion to an estimated 265 students in the 2025-2026 academic year. Although our charter permits us to accommodate up to 300 students, our budget planning remains conservative, aligning with the current enrollment trends.

The budget that was approved for Brick Church in the fiscal year 2023-2024 was set at \$16,500. However, as of September 2023, the actual rates have surpassed expectations, totaling \$16,825. This represents a significant overage compared to the budgeted amount, primarily due to demographic factors.

Looking ahead to the fiscal year 2024-2025, the projected rate is expected to align with the current year's actual figures. In the subsequent fiscal year, 2025-2026, we anticipate a slight increase of 1%, which is a modest increase considering Brick Church has seen 3%-13% historical increases.

The contingency plan for decreases in either enrollment or TISA fund is to tap into our philanthropic budget and continue to seek alternative funding that Brick Church has historically received that are not contiblated in the current projections.

- (b) *An explanation of all funding sources, including grants, state, federal, and local per-pupil eligibility, other government resources, private fundraising, eRate, student fees, donations, etc.;*

### **Additional Funding Sources Assumptions**

TISA: See above for explanation of TISA assumptions

#### ESSER Funding:

The 23.24 approved budget included ESSER funding and ESSER related expenses based on remaining available funds in the last year of grant eligibility. The 24.25 and 25.26 projected budgets do not include this funding and the related expenses have been adjusted.

#### TAG (Turnaround Action Grant):

The existing budget (23.24SY) incorporates \$86,000 in funding based on present allocations. The expected revenue for the fiscal year 24.25 has been adjusted for enrollment changes with a 0% inflation. As for the fiscal year 25.26, no assumptions have been made regarding this grant, as we may not meet the qualifications for funding by the second year

#### Title I, Title II, and IDEA:

The 23.24 approved budget amounts were based on actual estimated allocations from our authorizer. The projected Federal Fund rates for the 24.25 school year are calculated by taking the current expected rates for the 23.24 school year and applying a 0% inflation adjustment, along with making adjustments for any changes in enrollment. For the 25.26 school year, the rates are determined by applying a 0% inflation adjustment to the 24.25 rates and making adjustments for enrollment changes.

#### Philanthropy and Additional School Income:

LEAD Public Schools does not include philanthropic initiatives or additional school income in its budget planning. However, LEAD Public Schools retains the authority to assign network philanthropic resources to schools as a contingency measure in case of enrollment shortfalls, TISA rate reductions, or unexpected expenses during the school year. Specifically, we use these funds to offset management fees with Brick Church when appropriate.

#### Integrated School Model Grant (ISM Grant):

Brick Church received a competitive grant known as the Integrated School Model Grant, aimed at enhancing Career and Technical Education (CTE) programs in schools. The 23.24 school year budget consolidates the anticipated revenue and expenditures from both of these grants. The revenue and expenses for these grants have been removed from the remaining budget years for transparency purposes.

#### Charter School Facilities Grant (Competitive)

Brick Church has been honored with the Charter School Facilities Grant (Competitive) on two separate occasions, which spans across multiple years. The 23.24 school year budget consolidates the anticipated revenue and expenditures from both of these grants. The revenue and expenses for these grants have been removed from the remaining budget years for transparency purposes.

#### TSL Grant

LEAD Public Schools have received a TSL Grant that encompasses personnel-related costs and staff development. This funding is expected for the upcoming three years and has been distributed among our schools based on the percentage of staff for both budgetary and project considerations. The budget for the 23.24 school year incorporated the remaining funds from the initial TSL grant award. However, we received the second TSL grant during the same year, and this award was not originally accounted for in the budget. Notably, the second TSL award was considerably larger than the first one.

The fiscal years 2024-2025 and 2025-2026 both anticipate TSL funds, with the final year of this funding cycle concluding in the fiscal year 2026-2027. It's worth noting that by the 2025-2026, Brick Church will achieve a positive EBITA even without relying on non-recurring funding.

*(c) An explanation of all anticipated expenditures including those identified in Section 3.1(b);*

#### **Expenditures**

As a general rule, unless specified otherwise, all expenses are derived from historical spending figures,

adjusted to account for a 1% inflation rate, and further adjusted based on changes in enrollment or Full-Time Equivalents (FTE), whichever is relevant.

### ***Compensation, Benefits and Tax Expenses***

Personnel expenditures in the 23.24 budget are determined by the existing staffing levels and the average salaries. The total Full-Time Equivalent (FTE) count for the 23.24 budget stands at 46, with support from non-recurring revenue sources like ESSER, TAG, Integrated School Models, and TSL Grants. However, the projected budgets for the 24.25 and 25.26 school years anticipate a reduction in FTE counts to 36. The projections assume a consistent 4.5% annual increase in teacher salaries, derived from historical averages. While our performance compensation program generally yields annual increases of around 5-6%, we do not account for turnover in this calculation, so the actual impact is typically 4.5%. The hiring of new, potentially less experienced staff members does contribute to a blended rate of 4.5% per year for teachers. Employee insurance benefits are based on current averages and are expected to increase at 5% per year. Retirement is based on average rates and increases proportionally to salaries.

### ***Contract Services***

#### *Professional Development:*

Most professional development is conducted in house or through conferences within a typical year. The budget includes costs associated with professional development supplies and materials, costs associated with attending conferences, or having contract service providers come into the school. Brick Church also utilizes Relay to train high potential leaders within their building. In the 23.24SY budget, Brick used non-recurring funding to pay one time expenses related to All Means All, which explains the decrease in professional development from 23.24 to 24.25. LEAD does not anticipate any other major changes to the professional development program.

*Copier and Leasing:* Based on historical trends with no expected change to contracts or usage.

*Healthcare Services:* This line includes our contracted nurse, based on historical spend and in alignment with our contract.

#### *Transportation expenses:*

Transportation costs are budgeted according to the number of routes and the contractual cost per route specified in our multi year transportation agreement. As per the terms of our signed contract, we have factored in a 4% annual inflation rate. Our projections are calculated assuming the continuation of the existing routing system, which includes the same number of buses

*IT Services:* IT Service expenses budgeted here capture technology repairs provided by our outsourced provider. No changes in this area are expected.

#### *Contracted SpED Contract Services:*

This encompasses ExEd Outplacement Services, which utilize facilities dedicated to delivering high-quality services for children with special needs. In this category, we also allocate budget resources for contracted services that offer specialized support to students, ensuring that these services meet or surpass the Individualized Education Programs (IEPs) of students within the Brick Church student population. Costs associated with ExEd contract services are included in this category and are based on average costs of the current needs of our students

#### ***Supplies and Materials:***

### *Textbooks and Instructional :*

This includes all educational materials, resources, and intervention tools offered by Brick Church. The budget for the 23.24 school year featured a one-time curriculum implementation expense, funded by non-recurring sources, which explains the decrease in this category from 23.24 to 24.25. There are no other significant anticipated changes in these areas.

### *Student Supplies :*

This encompasses student disposable supplies and athletic-related expenditures. Student disposable supplies cover both mandated teacher reimbursements and general student supplies. Athletic expenses comprise coach stipends, referee payments, supplies, equipment, and transportation costs. No other notable changes are expected in these categories.

*Printing Paper :* Considering past spending patterns, there are no expected alterations in this domain.

### *Gifts/Awards Students :*

This category covers various student incentives, such as promotional merchandise and school dances. At Brick Church, we take great pride in acknowledging and rewarding diligent effort. Our budget assumptions for this program are based on our past spending patterns, and we do not foresee any upcoming changes. Additionally, this line item also includes extra expenses related to promoting social-emotional learning, fostering student happiness, enhancing access to college and career opportunities, and supporting extracurricular activities.

### *Gifts/Awards Staff :*

This category includes all staff initiatives, including swag and celebrations. Brick Church prides itself on rewarding hardwork. The assumptions are based on historical spend with no expected changes to this program.

### **Facilities Related Expenses**

*Rent:* In our 23.24SY budget, the current rental rate stands at \$1.33 per square foot x 85,347. We are presently in discussions with MNPS regarding a new rental rate that will be effective from July 1, 2024, to June 30, 2027. We expect the new rent to be \$5 per square foot, bring total rental rate to \$426,735. The network team currently occupies that facility, and we plan to charge them 35% of the rent for their space usage in order to partially mitigate the rental rate increase.

LEAD Public Schools acknowledges that our current building lease will eventually expire. We are well-prepared for this situation, with excellent credit, no existing debt obligations, and sufficient cash reserves to acquire a property within our neighborhood should negotiations with MNPS not yield a favorable agreement.

*Utilities:* The utility cost estimates are derived from historical usage trends in phone, electricity, gas, and water services.

*Custodial:* Estimates based on current contract of custodial vendor for the upkeep of the Brick Church facilities.

*Other-Security:* Brick Church employs security personnel on campus every day. The budget assumptions for this expense are founded on current spending levels, and there are no foreseen changes at the moment.

### **Other Charges**

*Staff Recruitment:* Staff recruitment expenses encompass all costs linked to the recruitment of qualified

candidates for school-level positions. These expenses cover items such as travel, hotel accommodations, and sign-on bonuses. There are no significant anticipated changes in this area.

*Student Recruitment and Family Engagement:* Student recruitment expenses encompass all costs linked to the recruitment of students and family engagement events. These expenses cover items such as communication platforms, community events, and promotional items. There are no significant anticipated changes in this area.

*Authorizer Fee:* Authorizer fees reflect the shift from 2.5% of BEP at the ASD to 3% of TISA at the TN Charter Commission.

*Management Fee:* Management fees are annually recalibrated to contribute to network expenses. All network schools are responsible for covering their portion of these expenses, provided they maintain a positive fund balance. The projected budgets incorporate a 9% management fee estimate. For detailed insights into assumptions related to equipment, furniture, technology, SIS implementation, audit, finance, IT, fundraising, marketing, capital investments, contingency funds, and insurance costs, please refer to the Network budget.

### **Capital Expenditures:**

Capital Expenditures are managed at the network level and do not directly affect the schools for profit and loss (P&L) calculations. However, when Capital Expenditures are grant-related, they are allocated to the schools when the corresponding revenue is received, as needed. Capital repairs with a cost exceeding \$1,000 and a useful life of over 3 years are incorporated into the network's budget.

- (a) *An explanation of who is responsible for the school's financials (both school/network level and governing board level)*

LEAD's CFO coordinates all finance and accounting activities at all schools, including the annual audit, and cash management. The CFO is responsible for the creation and implementation of school budgets, including quarterly update meetings with School Principals to discuss budget and actual expenditures. The CFO serves as the staff lead on the Finance Committee of the Board of Directors and manages payroll, accounts payable/receivable, budget amendments, financial reporting, and bank reconciliations. The LEAD CFO supervises a team of several accounting professionals to ensure that timely, accurate and compliant financial reporting occurs.

At LEAD, each School Leadership Team (SLT) is expected to manage their actual expenditures to their budget. Principals review and revise the Personnel components, as they are the primary drivers of staffing decisions. In the pursuit of training all members of the SLT to take on more responsibility, the Asst Principals of Instruction and Students manage the Instructional and Student Support budgets, respectively and the Director of School Operations manages the School Operations, Transportation and Facilities budgets. All members of the SLT are trained by, monitored and supported by the network finance staff in this process.

The CFO is supported by the LEAD Public Schools Board and Finance Committee. The LEAD Board of Directors is ultimately responsible for the financial compliance and performance of the LEAD network as a whole. Proposed budgets and actual financial performance is shared and reviewed first at the Finance Committee meeting and then shared with the full board at the following Board meeting. The Finance Committee also reviews any substantial changes or updates to financial procedures, staffing or financial compliance. The Board approves the annual budget, annual audit, 990, contracts and other major financial investments. The Board of Directors arranges annually for an independent certified public accounting firm to

conduct an audit of LEAD's financial statements. The Finance committee of the Board of Directors nominates the independent auditor and reviews the scope and results of the audit. The Finance committee receives notice of any consequential irregularities and management letter comments that the auditor noted during the engagement. Additionally, the Committee develops any policies or action plans necessary to address relevant weaknesses noted by the auditor. The Committee will also review all financial information of LEAD and provide recommendations to the Board of Directors.

- (d) *The school's contingency plans to meet financial needs if anticipated revenues are not received or are lower than expected;*

LEAD Public Schools purposefully provides conservative estimates of both revenue rates, enrollment and major expenses, such as personnel, in order to ensure that school budget targets are met. However, should the anticipated revenues come in lower than estimated to a point where the projected operating surpluses are not enough to cover the decrease in such revenues, LEAD would consider the following options and will evaluate them based on minimizing impact to the academic programming of the schools. Options include increasing grant or philanthropic fundraising, increasing student enrollment, cutting back on discretionary supplemental materials or supplies, and finally, foregoing backfilling non-teaching vacant positions across the network. Brick Church has a positive fund balance, and LEAD Public Schools as a network currently holds over 125 days cash on hand. If LEAD was concerned about temporary cash flow, we would dip into these reserves. In addition, LEAD board annually approves an operating budget that evidences a positive cash position at year end and has obtained a line of credit from Capstar Bank to smooth cash flow if necessary; however this line of credit has never been required in the history of LEAD.

- (e) *How the school is accounting for increased costs that may be necessary if authorized by the Charter Commission (e.g. transportation, food service, services to special populations, etc).*

There are a number of operational changes that must be considered in the transition to a new authorizer, some of which have financial implications.

We have already outsourced several expenditures to third party providers. As these services are not provided by the ASD or MNPS, the budget assumptions do not change under new authorization. Those services include:

- Transportation
- Custodial services and repairs & maintenance of the facility
- Exceptional Education contracted services
- Outplacement costs for special day schools

Some costs will increase as a result of the shift to the TN Charter Commission. Those include:

- Authorizer Fee- The TN Charter Commission charges an authorizer fee of 3%, which is higher than the ASD rate of 2.5%. This is factored into our expense assumptions.

Furthermore, there are some costs that may be impacted by our transition, depending on ongoing conversations:

- Food Service- Based on informal conversations with MNPS, we do not anticipate food service to change under new authorization. However, we are prepared to switch vendors to an external provider if needed. MNPS has shared our financial performance for food service and has shown that Brick Church is currently running a net profit given the reimbursement rates of the school, but given the additional administrative costs of running our own food service, we would expect bringing food service in house to result in a small net loss, especially in the early years. While this is not included in our future budget forecast, we have enough net at LEAD Network to accommodate a loss, if realized.

L. Network Budget

<b>24-25 Anticipated Budget: LEAD Public Schools Network</b>		
<b>Enrollment</b>	<b>2270</b>	
<b>Revenue</b>		
<b>State Revenues</b>	<b>Budget</b>	<b>Assumption Notes</b>
TISA	\$ 36,075,000	Based on blended TISA rate of \$16,260
Turnaround Action Grant	\$ 86,575	See BC Narrative
<b>Federal Revenues</b>		
Title I	\$ 1,954,900	Proportional to current rates (\$ per total ADM)
Title II	\$ 144,511	Proportional to current rates (\$ per total ADM)
Title III	\$ 28,493	Proportional to current rates (\$ per total ADM) (NB Only)
Title IV	\$ 1,930	Proportional to current rates (\$ per total ADM) (NB Only)
IDEA	\$ 524,434	Proportional to current rates (\$ per total ADM)
TSL Grant	\$ 4,177,506	Current 24.25 Grant Allocations
<b>Fundraising &amp; Philanthropy</b>	<b>\$ 1,500,000</b>	<b>Based on 23.24 Budget and projections</b>
<b>Total Revenues</b>	<b>\$ 44,493,349</b>	
<b>EXPENSES</b>		
<b>PERSONNEL EXPENSES</b>		
Salaries and Wages	\$ 24,239,875	Includes School Wages and Network Wages (Network Wages \$4M)
Total Employer Benefits & Taxes	\$ 5,352,423	
<b>Total Personnel Expenses</b>	<b>\$ 29,592,299</b>	
<b>Operating Expenses</b>		
Instructional Expenses	\$ 2,095,069	Based on all instructional spend; scaled for students & inflation
Student Support Expenses	\$ 651,068	Based on all student support spend; scaled for students & inflation
School Operations	\$ 1,686,867	Based on all school operations spend; scaled for students & inflation
Facility Related Expenses	\$ 2,977,027	Based on all school facilities spend (see school narrative for network rent at BC)
Transportation	\$ 3,348,508	Based on current contract, scaled for enrollment
<b>Total Operating Expenses</b>	<b>\$ 10,758,540</b>	
<b>Authorizer Fee</b>	<b>\$ 429,138</b>	<b>MNPS &amp; TN Charter Commission Fees</b>
<b>Network General &amp; Administrative Costs</b>		
Financial Services	\$ 50,000	Accounting and billing systems; Bank Fees
Audit Services	\$ 70,000	Annual financial audit
Legal Fees	\$ 50,000	Legal fees
Professional Development	\$ 100,000	Executive Coaching supports
LEAD University	\$ 45,000	Annual Summer PD
Office & Admin supplies & equipment	\$ 30,000	Network (home office) supplies
Senior Signing Day	\$ 100,000	Annual celebratory student event
IT Contract Services	\$ 450,000	Outsourced IT Support
HR & Payroll Fees	\$ 100,000	HRIS system, benefits administration
General Liability Insurance	\$ 85,000	Liability, D&O, Property Insurance
Fundraising Expenses	\$ 50,000	Fundraising software, materials, postage
Marketing & Communications	\$ 100,000	PR support, branding, video, marketing materials, signage
Staff Recognition & Events	\$ 20,000	Staff celebratory events
Talent Recruitment	\$ 75,000	Recruitment platforms, career fairs, travel
Family Engagement	\$ 15,000	Philanthropy funded support of LEAD families
Academic Contracted Services & Consulting	\$ 200,000	External Instructional Coaching; PD on curriculum, etc
Network Facilities Costs	\$ 30,000	Office & facilities expense for network team
Data Infrastructure	\$ 200,000	Computer Software, SIS integration, Data platforms
<b>Total General &amp; Administrative Costs</b>	<b>\$ 1,770,000</b>	
<b>Total Expenses</b>	<b>\$ 42,549,976</b>	
<b>Total Revenue</b>	<b>\$ 44,493,349</b>	
<b>Total Expenses</b>	<b>\$ 42,549,976</b>	



<b>EBITDA</b>	<b>\$</b>	<b>1,943,373</b>	
Interest Income	\$	35,000	Interest earned on cash
Depreciation	\$	1,500,000	Network wide depreciation
<b>Net Income</b>	<b>\$</b>	<b>478,373</b>	
<b>Capital Investments</b>			
Building Improvements	\$	500,000	Building improvements, HVAC replacements, capital repairs
Furniture & Fixtures	\$	25,000	Furniture replacements, as needed
Technology	\$	500,000	Annual refresh of student, staff computers & classroom tech
<b>Total Capex</b>	<b>\$</b>	<b>1,025,000</b>	
<b>Net Cash</b>	<b>\$</b>	<b>953,373</b>	

## Future Facilities Assumptions (should lease expire)

	Renovation of Purchased Space	Notes
Students @ Full Enrollment	265	
<b>Facility Profile</b>		
Square Foot per Student	151	
Total Square Foot Required	40,000	
<b>Project Cost Summary</b>		
Acquisition	\$6,000,000	Based on existing site search
Cost per Square Foot -- Hard Costs	\$150	Based on national charter school information
Hard Costs	\$6,000,000	
10% Contingency	\$600,000	
FF&E	\$250,000	
Soft Costs w/ Contingency @ 13% of		
12.5% Development Costs	\$750,000	
<b>Total Development Costs</b>	<b>\$13,600,000</b>	
3% Transaction Costs	\$908,000	To cover legal costs, origination fees, etc. for LT financing
0% Debt Service Reserve Fund	\$1,300,000	Sized for one year's debt service (req'd for LT bond financing)
12 Capitalized Interest @ 12 months	\$1,068,000	To cover interest expense during construction / renovation
<b>Total Project Costs</b>	<b>\$16,876,000</b>	
<b>Financing Assumptions</b>		
Rate	8.00%	
Term	35	
Amortization	35	
<b>Planned Equity Contribution</b>	<b>\$10,000,000</b>	Assumes fundraising and/or partial commitment of cash reserves
Loan Amount	\$6,876,000	
<b>Annual Payment</b>	<b>\$590,000</b>	

## L. Network Financial Plan

### Network Financial Plan

*In this section:*

- (a) *Describe the fiscal health of other schools in your network. Are any of the schools on fiscal probation or in bankruptcy?*

LEAD Public Schools continues to be in a strong financial position as described in detail in our annual audits, all of which are found on our website, [www.leadpublicschools.org](http://www.leadpublicschools.org), under the "Public Information" tab. LEAD has received an unqualified opinion (clean opinion) from outside auditors each year of its existence, and has had multiple years of budget surpluses, all of which have resulted in a strong cash position. LEAD has met financial compliance expectations, including submitting annual budgets and audited financial statements to authorizers and the state in a timely fashion. LEAD does not have any schools on fiscal probation or in bankruptcy.

- (a) *Provide, as Attachment L, a detailed budget for the network. You may reference the school-level budgets provided in Sections 3.1 and 3.2, as appropriate. Applicants must submit financial forms detailing:*

See attached for the Network Budget. Below are assumptions related specifically to the Network Budget.

### Revenue

**Student Enrollment:** Student Enrollment is based on LEAD's current network-wide student enrollment. When we set our enrollment projections, key variables include: opportunities/threats to enrollment growth, analysis of historical enrollment trends and population data, area competition, consideration of changing demographics and alignment to our geographic priority areas. LEAD plans to continue operating all of its existing schools in the future.

**Revenue:** TISA-All school-based per pupil and federal funding has the same assumptions as those outlined in the school budget, merely factored up for the network enrollment. TISA rates are based on blended rates from all schools with their specific population.

**TSL Grant:** In the school budget narrative, you'll find information about this grant. The network assumptions include allocations for resources and grant-related expenses. When the three-year grant ends, the LEAD plans to reduce personnel and professional development costs to offset the decrease in revenue. This approach ensures financial sustainability long-term.

**Philanthropy:** LEAD is dedicated to actively raising philanthropic funds for the benefit of its students. LEAD anticipates total philanthropic dollars of \$1.5M per year. This is in alignment with both current year estimates for fundraising and prior year actuals. Fundraising is secured through annual fundraisers, most notably, our Commitment Breakfast, through solicitation of individual donors and through private grants. Private grants have included, as an example, the

Scarlett Family Foundation, Charter School Growth Fund, Dollar General, SCORE and the TN Arts Commission.

## **School Expenses**

The LEAD network allows each school leadership team to suggest customization of their budget line items to adapt to the unique needs of their school. For example, one school may need to budget for more translation services because of the unique language needs of their families while another may need to increase the amount of exceptional education contracted services and another may need a disproportional number of bus routes due to its geography. Each year the network compares each school with each other and against student demographic and student outcome measures to ensure efficiency of spend and equity of spend. The sum of those budgets are represented in the School Personnel, Instruction, Student Support, School Operations, Transportation and Facilities budget sections.

## **Network Expenses (Back-office budget)**

Network expenses are comprised of personnel, general & administrative expenses, network capital expenses and contingency costs. Management fees charged to the schools fully pays for all these network expenditures.

**Personnel:** Staffing at the home office level is commensurate with current staffing levels, but includes an increase of 2 FTE for additional staff and student recruitment to support the ongoing needs of our current schools and to support the geographic expansion of LEAD Brick Church. Total employee compensation of the home office is \$4M. \$0 of that is allocated to Brick Church. Instead, any overhead is paid for by the 9% management fee.

**Network G&A:** Network G&A is composed of all expenditures related to network support for schools including academic, operational, legal, financial, marketing and fundraising expenses. All expenses are based on current actual spend and specific assumptions are found in the budget workbook. Fundraising expenditures include fundraising software, materials, postage, fundraising consulting, promotional materials and travel for the development team. Marketing expenditures include a monthly retainer for communications firm, marketing materials, professional photography, videos, contract services to produce our annual report and communication and website platforms.

### **Facilities:**

LEAD is financially well-prepared for any future facility needs, boasting strong credit and a healthy cash reserve for purchases or renovations. Notably, we are currently debt-free, having paid off our sole leased property in the 22.23 school year. This demonstrates our financial stability and readiness for potential changes in facilities.

**Capital expenses:** Capital expenses are budgeted for at the network level, where annual depreciation is also booked. (Note that LEAD tracks and can report capital expenditures also by school for purposes of the required annual government audit). Each year all schools submit proposals for needed capital repairs and enhancements of the individual school buildings and then those are prioritized across the network to ensure the most significant needs are met first. Building improvements include both planned maintenance and upgrades, as well as

contingency for major repairs, such as HVAC replacement. Furniture capital expenditures is set aside to replace used and damaged furniture over time. Technology is ordered and managed at the network level, with the expectation that Chromebooks are replaced every three years and staff computers are replaced every five. Technology capex also includes provisions for any IT infrastructure upgrades and any related erate funding is budgeted for depending on the allowability of the project. LEAD has budgeted \$1.5M in annual depreciation costs network wide.

**Contingency & Reserve:** LEAD budgets for contingency and reserve funds at the network level. Each year, LEAD budgets a EBITDA contingency allowance to provide flexibility should revenue come in lower than anticipated or should an unexpected expense occur. In addition, should annual philanthropy come in above budget, that funding is also set aside to fund a reserve fund for either rainy day or future investments. Currently LEAD has generated \$29M in net assets with \$19M being held in cash or cash equivalents. This unrestricted funding can be used to fund strategic investments, most notably, the downpayment on a new facility should the need arise at Brick Church or another school. The proposed 24-25 Budget attached evidences an EBITDA of \$1.6M, and a positive net cash flow of \$953K after accounting for interest earned and capital expenditures.



**About the Achievement School District**

Over the past decade, education has remained a top priority for Tennessee; this commitment established the foundation for education reform in our state and ultimately the creation of the Achievement School District (ASD). Established in 2012 as a statewide school district, the ASD was charged with turning around the state’s lowest-performing schools.

The ASD represents a bold effort to transform student achievement in Tennessee’s lowest performing Priority Schools, with a goal of implementing effective interventions that produce the desired and expected results, thereby substantially raising student achievement, and successfully transitioning schools to operate either back to their home district or under the Tennessee Public Charter School Commission. Currently acting as an authorizing district, ASD empowers school leaders and operators to create great schools by maximizing their autonomy and resources and by holding them accountable for transformative academic outcomes and operational health. The ASD also partners with parents and communities to create great schools where students can reach their highest potential.



## ASD School Performance Framework

### Part A: Introduction

As a condition of their formal contracts with the Achievement School District, all participating charter schools operated under the following requirements related to academic oversight and accountability:

- “During the term of the charter, the ASD shall retain the right to review the academic, operational, and financial performance of the Operator.”
- “In the (ASD) School Performance Framework, key criteria have been included to measure performance of a school.”
- “The ASD School Performance Framework includes a subset of metrics that combine to create a Composite Score to determine if schools are on track to dramatically improve outcomes for students... The ASD will use the Operator’s School Composite Score to determine the closure or rate of replication for the Operator’s schools in the ASD.”
- “An Operator must meet 100% of financial metrics. Failure to do so would result in an automatic “Does Not Meet” for all schools.”

This report is provided to each ASD charter school as a reference tool to inform dialogue between the school leadership team, ASD, and the Tennessee Department of Education (“department”) regarding future strategy for improvement. Part B outlines the SPF methodology; Part C details performance for your school; and Part D describes next steps.

### Part B: Review of SPF Methodology

Each school is assessed based on data metrics in the categories of Finance, Student and Family Rights, and Academic Composite.

Category	Description	Metrics
<b>Finance</b>	The metrics in this category are measured at the operator level and ensure operators are financially responsible and viable.	<ul style="list-style-type: none"> <li>• Cash on hand</li> <li>• Threshold ratio</li> <li>• Financial audit</li> </ul>
<b>Student &amp; Family Rights</b>	The metrics in this category are measured at the school level and ensure school compliance with significant legal obligations.	<ul style="list-style-type: none"> <li>• Access</li> <li>• Enrollment</li> <li>• Health &amp; safety</li> <li>• Leadership</li> <li>• Voice</li> </ul>
<b>Academic Composite Score</b>	Metrics in this category are measured at the school level and ensure operators are on track to move schools out of the bottom 5% in the state and are serving students well.	<ul style="list-style-type: none"> <li>• Mission</li> <li>• School progress</li> <li>• Student progress</li> <li>• Equity</li> <li>• College &amp; Career</li> </ul>



### Part C: Performance Summary

In order to support a charter school's efforts in promoting student achievement and fulfill its contractual duty to gauge academic performance using the SPF (Section 3.8 of Charter Agreement), the department and the ASD have calculated each school's current levels of performance based on its 2021-2022 academic, financial, and stakeholder data.

Based on data from the 2021-2022 academic year, the school's overall SPF rating is based upon each category rating, which is in turn based upon the specific metrics.



The school's rating for each category as well as the overall rating falls into one of four possible classifications:



The rubric on the next page outlines how a school is rated on each metric and category. **A school's overall SPF rating will be based on its lowest-performing category.** Below is an example rating. In this example, the school's lowest-performing category is "Academic Composite Score" with an "Approaching" rating; therefore, the school's overall SPF rating is "Approaching."

#### Example Rating







School Performance Framework Rubrics

Finance Category Rubric			
Metric	Does Not Meet	Approaching	Meeting
Cash on hand	Less than 30 days cash on hand	N/A – this rating is not available for this metric	30 days cash on hand
Threshold	Less than a 1:1 ratio	N/A – this rating is not available for this metric	Equal to a 1:1 ratio
Financial audit	Issues with audit	N/A – this rating is not available for this metric	Clean financial audit
<b>Overall Rating:</b>			
<ul style="list-style-type: none"> <li>Failure to receive a rating of “Meeting” for any metric in this category would result in an automatic “Does Not Meet” for this category.</li> <li>An operator could receive a rating of “Exceeding” for this category if two of three metrics are rated as “Exceeding.”</li> <li>All CMOs will be held harmless for the Cash on Hand indicator for 2021-2022 due to delays in federal reimbursements and/or other payments that negatively impacted cash flow for all CMOs.</li> </ul>			
Exceeding			
More than 30 days cash on hand			
More than a 1:1 ratio			
N/A – this rating is not available for this metric			

Student & Family Rights Category Rubric			
Metric	Does Not Meet (0pts)	Approaching (1pt)	Meeting (2pts)
Access: Right to Special Services	Egregious non-compliance	<p>Only one of the following is true:</p> <ul style="list-style-type: none"> <li>ASD has verified the appropriate provision of special education services for all qualifying students</li> <li>ASD has received no complaints or statements of concern indicating any</li> </ul>	<p>ASD has verified the appropriate provision of special education services for all qualifying students, <u>AND</u> ASD has received no complaints or statements of concern indicating any underlying issues in the school’s delivery of special services.</p>
Exceeding			
N/A – this rating is not available for this metric			

<p>Enrollment: Right to School Choice &amp; Equitable Environment</p>	<p>Egregious non-compliance</p>	<p>underlying issues in the school's delivery of special services.</p> <p>Only one of the following is true:</p> <ul style="list-style-type: none"> <li>ASD has verified the school's application processes comply with all state and local requirements</li> <li>ASD has received no complaints or statements of concern indicating that the school's systems foster inequitable school offerings.</li> </ul>	<p>ASD has verified the school's application processes comply with all state and local requirements AND ASD has received no complaints or statements of concern indicating that the school's systems foster inequitable school offerings.</p>	<p>N/A – this rating is not available for this metric</p>
<p>Health &amp; Safety</p>	<p>Egregious non-compliance</p>	<p>Only one or two of the following is true:</p> <ul style="list-style-type: none"> <li>The school's facilities have met local and state requirements for fire safety and occupancy.</li> <li>The school meets district health and safety standards.</li> <li>ASD has received no complaints or statements of concern indicating that the</li> </ul>	<p>The school's facilities have met local and state requirements for fire safety and occupancy, <u>AND</u> ASD has conducted on-site visits to the school and has verified the school meets district health and safety standards, <u>AND</u> ASD has received no complaints or statements of concern indicating that the school presents a risk to health or safety of students, staff, or</p>	<p>N/A – this rating is not available for this metric</p>



		school presents a risk to the health or safety of students, staff, or families.	families.	
Leadership: Right to Qualified Staff	Egregious non-compliance	Not all school faculty and administrators meet state and district standards for certification, but the school is actively working to ensure standards are met.	All school faculty and administrators meet state and district standards for certification.	N/A – this rating is not available for this metric
Voice: Right to be Included/Informed	Egregious non-compliance	ASD has observed practices at the school that demonstrates active engagement with families & community stakeholders.	ASD has observed practices at the school that demonstrates active engagement with families & community stakeholders.	N/A – this rating is not available for this metric
<b>Overall Rating:</b>				
<ul style="list-style-type: none"> <li>Egregious noncompliance in any metric will result in a “Does Not Meet” rating in this category. Egregious noncompliance occurs when a school 1) Fails to receive a rating of “Meeting” in a Student and Family Rights metric over several years, 2) Fails to receive a rating of “Meeting” in at least 75% of Student and Family Rights Accountability items in a single year, or 3) Engages in “grossly negligent act(s) that deny access to education, lead to significant student harm, and/or invalidate accountability results.”</li> <li>Each category has had a point total applied (DNM=0; Meets=1; Exceeds=2). An average of all scores in this section will be calculated and the final SPR rating will be determined from that score (Does Not Meet ≤ 0; Approaching = 1-1.99; Meeting ≥ 2.0)</li> </ul>				

Academic Composite Category Rubric					
Metric	Description	Does Not Meet	Approaching	Meeting	Exceeding
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR $\geq$ 6% OR Annual Measurable Objective (AMO)	SSR $\leq$ 3% or AMO not met  0 points	SSR of 5%-4% or AMO not met  5 points	Met SSR of 6% or met AMO  10 points	SSR of $\geq$ 7% or exceeded AMO  15 points
School Progress: Progress on Components of R-SSR	Progress on Components of Reward School Success Rate (R-SSR/Subject TVAAS)	TVAAS 1  0 points (3-8) 0 points (HS)	TVAAS 2  10 points (3-8) 5 points (HS)	TVAAS 3  20 points (3-8) 10 points (HS)	TVAAS 4 or 5  30 points (3-8) 20 points (HS)
Student Progress: Composite TVAAS	<ul style="list-style-type: none"> <li>Level 1: Significantly Below Expectations</li> <li>Level 2: Below Expectations</li> <li>Level 3: At Expectations</li> <li>Level 4: Above Expectations</li> <li>Level 5: Significantly Above Expectations</li> </ul>	Level 1  0 points (3-8) 0 points (HS)	Level 2  10 points (3-8) 5 points (HS)	Level 3  20 points (3-8) 10 points (HS)	Level 4 or 5  30 points (3-8) 20 points (HS)
Equity: Progress on Components of SSR	Target: Decrease the number of students scoring Below or Approaching by 10% in all applicable subgroups.	$\leq$ 6% decrease  0 points	7% - 9% decrease  3 points	10% decrease  7 points	$\geq$ 11% decrease  10 points



College & Career	<b>Graduation Rate Gains</b> Target: 10 pt. gains or Y1: $\geq 5$ th; Y2 $\geq 10$ th; Y3: $\geq 25$ th; Y4 $\geq 40$ th; Y5: $\geq 50$ th	$\leq 4$ points or Y1: $< 4$ th; Y2: $< 5$ th; Y3: $< 10$ th; Y4: $< 25$ th; Y5: $< 40$ th	5-6 points or Y1: $\geq 4$ th; Y2: $\geq 5$ th; Y3: $\geq 10$ th; Y4: $\geq 25$ th; Y5: $\geq 40$ th	10 points or Y1: $\geq 5$ th; Y2: $\geq 10$ th; Y3: $\geq 25$ th; Y4: $\geq 40$ th; Y5: $\geq 50$ th	$\geq 11$ points or Y1: $\geq$ 10th; Y2: $\geq 25$ th; Y3: $\geq 40$ th; Y4: $\geq 50$ th; Y5: $\geq 60$ th
	<b>Avg. ACT Score</b> Target: 14+	$\leq 11$ avg. score	12-13 avg. score	14-15 avg. score	$\geq 16$ avg. score
<b>Overall Rating:</b> <ul style="list-style-type: none"> <li>An operator must earn at least 50 points to receive a rating of "Approaching," at least 70 points to receive a rating of "Meeting," and at least 90 points to receive a rating of "Exceeding."</li> </ul>		<b>0 points</b>	<b>3 points</b>	<b>7 points</b>	<b>10 points</b>
		<b>0 points</b>	<b>3 points</b>	<b>7 points</b>	<b>10 points</b>



## **LEAD Public Schools**

In 2007, LEAD was founded on the belief that all students deserve access to a great education that prepares them for the future— regardless of their zip code.

LEAD is on a mission to transform education one student at a time. Serving in a diverse city, 30% of the students at LEAD are bilingual learners, creating a uniquely rich environment for both students and staff. Since its founding, middle and high school students have consistently grown academically at above-average rates, according to state tests.

Additionally, LEAD is proud to invest in teachers. In 2019, LEAD announced a bold new initiative to transition to a performance-based compensation plan and increase what effective teachers can earn. Looking ahead to the next decade, LEAD Public Schools is committed to attracting, growing, and retaining the best teachers and leaders because they know that will mean great student outcomes.



<b>School Name</b>	LEAD Brick Church
<b>Address</b>	2835 Brick Church Pike Nashville, TN 37207
<b>Phone</b>	(615) 815-1264
<b>Website</b>	<a href="http://www.leadpublicschools.org">www.leadpublicschools.org</a>
<b>School Leader</b>	Kathryn Rice McKinzie
<b>School Mission</b>	LEAD Public Schools prepares all our students with the skills and knowledge they need to be ready for college and life.
<b>Operating Status</b>	OPEN
<b>Year Opened</b>	2012-2013
<b>Grades Served in 2021-2022</b>	5-8
<b>Enrollment in 2021-2022</b>	227
<b>Contracted Services</b>	n/a
<b>Approved Waivers</b>	n/a



### LEAD Brick Church SPF Report

Academic Composite			
Metric	Performance	Score	Rating
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR: <b>5.7%</b>	5	Approaching
School Progress: Progress on Components of R-SSR	Highest Subject TVAAS: <b>5 (Math)</b>	30	Exceeding
Student Progress: Composite TVAAS	TVAAS: <b>5</b>	30	Exceeding
Equity: Progress on Components of SSR	Decrease the number of students scoring Below or Approaching by 10%: <b>16.2%</b>	10	Exceeding
Composite Score		75/85= 88%	
Overall Category Rating		Meeting	
* is classified as a [K-8/high] school for the purpose of calculating campus academic composite scores.			

Student & Family Rights		
Metric	Performance	Metric Rating
Access: Right to Special Services	Brick Church did not experience challenges with the identification, enrollment, or servicing of students in special populations (ESL, Homeless, Foster Care, Migrant).	Meeting
Enrollment: Right to School Choice & Equitable Environment	ASD has verified the school's application processes comply with all state and local requirements, <u>AND</u> ASD has received no complaints or statements of concern indicating that the school's systems foster inequitable school offerings.	Meeting
Health/Safety	All immunizations were submitted. ASD has received no complaints or statements of concern indicating that the school presents a risk to the health or safety of students, staff, or families.	Meeting





<b>Leadership: Right to Qualified Staff</b>	All school faculty and administrators meet state and district standards for certification.	<b>Meeting</b>
<b>Voice: Right to be Included/Informed</b>	ASD has observed practices at the school that demonstrate active engagement with families & community stakeholders.	<b>Meeting</b>
<b>Overall Category Rating</b>		<b>Meeting</b>

<b>Finance</b>		
<b>Metric</b>	<b>Performance</b>	<b>Metric Rating</b>
<b>30 Days Cash on Hand</b>	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
<b>Threshold Ratio</b>	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
<b>Financial Audit</b>	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
<b>Overall Category Rating</b>		<b>Pending Submission of Final Audit</b>

N. Most recent internal financial statements

**Lead Public Schools**  
**Balance Sheet Detail Trend**

As of October 31, 2023

(Unaudited - For Management Purposes Only)

As of Date:

10-31-2023

Month Ending  
10-31-2023

Actual

**Assets**

Current Assets	24,871,717
Other Long Term Assets	97,554
Fixed Assets	17,521,267
Accumulated Depreciation	(8,589,816)
<b>Total Assets</b>	<b>33,900,722</b>

**Liabilities and Equity**

Liabilities	5,019,104
Equity	
Net Assets	29,072,551
Net Profit and Loss	(190,933)
Total Equity	28,881,618
<b>Total Liabilities and Equity</b>	<b>33,900,722</b>

Lead Public Schools  
IS\_Budget\_vs\_Actual\_Network  
As of October 31, 2023  
As of Date:

10-31-2023

Year To Date  
10-31-2023

Actual YTD

Revenue	
BEP	11,721,132
Federal Grants	1,999,855
Philanthropy	170,996
Other Misc Revenue	<u>2,986</u>
Total Revenue	<u>13,894,969</u>
Expenses	
Personnel Expenses	10,628,144
Instructional	1,297,346
Student Support	216,983
School Operations	789,478
Transportation	1,002,190
Facilities Expense	1,164,226
G & A	710,346
Authorizer Fee	<u>121,782</u>
Total Expenses	<u>15,930,495</u>
EBITDA	<u>(2,035,526)</u>
Depreciation	(567,406)
Interest Income/Expense	316,136
Net Income	<u>(2,286,796)</u>

**LEAD PUBLIC SCHOOLS, INC.  
AND AFFILIATES**

CONSOLIDATED FINANCIAL STATEMENTS

*As of and for the Years Ended June 30, 2022 and 2021*

*And Report of Independent Auditor*

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
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## Report of Independent Auditor

To the Board of Directors  
LEAD Public Schools, Inc. and Affiliates  
Nashville, Tennessee

### Report on the Consolidated Financial Statements

#### **Opinion**

We have audited the accompanying consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statements of financial position as of June 30, 2022 and 2021, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of LEAD Public Schools, Inc. and Affiliates as of June 30, 2022 and 2021, and the changes in their net assets and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

#### **Basis for Opinion**

We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Consolidated Financial Statements* section of our report. We are required to be independent of LEAD Public Schools, Inc. and Affiliates and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### **Emphasis of Matter**

As discussed in Note 1 to the consolidated financial statements, the Organization changed its method of accounting for leases as of July 1, 2021, due to the adoption of the Accounting Standards Update 2016-02, *Leases (Topic 842)*, as amended. Our opinion is not modified with respect to this matter.

#### **Responsibilities of Management for the Consolidated Financial Statements**

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error. In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about LEAD Public Schools, Inc. and Affiliates' ability to continue as a going concern for a period of one year subsequent to the date of the consolidated financial statements.

### ***Auditor's Responsibilities for the Audit of the Consolidated Financial Statements***

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and, therefore, is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users made on the basis of these consolidated financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audits.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about LEAD Public Schools, Inc. and Affiliates' ability to continue as a going concern for a reasonable period of time.

### ***Other Reporting Required by Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated March 30, 2023, on our consideration of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and compliance.

*Cherry Bekaert LLP*

Nashville, Tennessee  
March 30, 2023

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENTS OF FINANCIAL POSITION**

*JUNE 30, 2022 AND 2021*

	<u>2022</u>	<u>2021</u>
<b>ASSETS</b>		
Current Assets:		
Cash and cash equivalents	\$ 11,085,693	\$ 12,438,933
Accounts receivable	11,516,319	3,380,988
Prepaid expenses and other	<u>498,074</u>	<u>80,811</u>
Total Current Assets	23,100,086	15,900,732
Right-of-use asset - operating lease	4,099,576	-
Property and equipment, net	<u>7,535,108</u>	<u>8,132,522</u>
<b>Total Assets</b>	<u><u>\$ 34,734,770</u></u>	<u><u>\$ 24,033,254</u></u>
<b>LIABILITIES AND NET ASSETS</b>		
Current Liabilities:		
Accounts payable	\$ 1,341,312	\$ 1,065,088
Accrued expenses	1,888,714	1,321,117
Operating lease liabilities, current portion	635,322	-
Notes payable, current portion	<u>-</u>	<u>164,947</u>
Total Current Liabilities	3,865,348	2,551,152
Operating lease liabilities, noncurrent portion	3,718,878	-
Notes payable, noncurrent portion	<u>-</u>	<u>5,673,014</u>
Total Liabilities	<u>7,584,226</u>	<u>8,224,166</u>
Net Assets:		
Without donor restrictions	27,150,544	15,764,088
With donor restrictions	<u>-</u>	<u>45,000</u>
Total Net Assets	<u>27,150,544</u>	<u>15,809,088</u>
<b>Total Liabilities and Net Assets</b>	<u><u>\$ 34,734,770</u></u>	<u><u>\$ 24,033,254</u></u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.



**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**

YEAR ENDED JUNE 30, 2022

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
<b>Public Support and Revenue:</b>			
District funding	\$ 38,968,491	\$ -	\$ 38,968,491
Federal grants	12,180,680	-	12,180,680
Contributions and other	766,762	373,500	1,140,262
Interest income	35,401	-	35,401
Net assets released from restrictions	418,500	(418,500)	-
Total Public Support and Revenue	<u>52,369,834</u>	<u>(45,000)</u>	<u>52,324,834</u>
<b>Expenses:</b>			
Student instruction and services	37,758,851	-	37,758,851
Administration	2,853,890	-	2,853,890
Fundraising	370,637	-	370,637
Total Expenses	<u>40,983,378</u>	<u>-</u>	<u>40,983,378</u>
Change in net assets	11,386,456	(45,000)	11,341,456
Net assets, beginning of year	<u>15,764,088</u>	<u>45,000</u>	<u>15,809,088</u>
Net assets, end of year	<u>\$ 27,150,544</u>	<u>\$ -</u>	<u>\$ 27,150,544</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**

*YEAR ENDED JUNE 30, 2021*

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
<b>Public Support and Revenue:</b>			
District funding	\$ 37,074,425	\$ -	\$ 37,074,425
Federal grants	4,885,320	-	4,885,320
Contributions and other	482,742	300,000	782,742
Net assets released from restrictions	<u>255,000</u>	<u>(255,000)</u>	<u>-</u>
Total Public Support and Revenue	<u>42,697,487</u>	<u>45,000</u>	<u>42,742,487</u>
<b>Expenses:</b>			
Student instruction and services	30,610,836	-	30,610,836
Administration	3,644,565	-	3,644,565
Fundraising	<u>274,102</u>	<u>-</u>	<u>274,102</u>
Total Expenses	<u>34,529,503</u>	<u>-</u>	<u>34,529,503</u>
Change in net assets	8,167,984	45,000	8,212,984
Net assets, beginning of year	<u>7,596,104</u>	<u>-</u>	<u>7,596,104</u>
Net assets, end of year	<u>\$ 15,764,088</u>	<u>\$ 45,000</u>	<u>\$ 15,809,088</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES**

YEAR ENDED JUNE 30, 2022

	<b>Student</b>	<b>Supporting Services</b>		<b>Total</b>
	<b>Instruction and Services</b>	<b>Administration</b>	<b>Fundraising</b>	
Salaries, wages, and benefits	\$ 24,721,647	\$ 1,333,937	\$ 314,096	\$ 26,369,680
Occupancy	3,627,880	109,244	2,317	3,739,441
Professional and service fees	1,994,659	591,561	-	2,586,220
Transportation	2,942,908	42,256	-	2,985,164
Depreciation and amortization	1,369,981	10,592	-	1,380,573
Instructional	1,011,321	56,491	7,995	1,075,807
Office supplies and equipment	833,252	36,478	-	869,730
Organizational development	278,942	190,921	-	469,863
Authorizer fees	-	323,401	-	323,401
Interest cost	258,749	-	-	258,749
Athletic cost	297,280	-	-	297,280
Outreach	102,638	-	-	102,638
Miscellaneous	225,752	159,009	-	384,761
Loss on disposal of assets	93,842	-	-	93,842
Staff development	-	-	46,229	46,229
<b>Total Expenses</b>	<b>\$ 37,758,851</b>	<b>\$ 2,853,890</b>	<b>\$ 370,637</b>	<b>\$ 40,983,378</b>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES**

YEAR ENDED JUNE 30, 2021

	<b>Student</b>	<b>Supporting Services</b>		<b>Total</b>
	<b>Instruction and Services</b>	<b>Administration</b>	<b>Fundraising</b>	
Salaries, wages, and benefits	\$ 22,389,857	\$ 1,829,703	\$ 183,007	\$ 24,402,567
Occupancy	2,417,364	103,811	-	2,521,175
Professional and service fees	1,051,126	968,811	56,645	2,076,582
Transportation	1,783,813	3,385	-	1,787,198
Depreciation	1,255,027	69,205	-	1,324,232
Instructional	645,426	114,114	6,919	766,459
Office supplies and equipment	490,944	108,293	1,452	600,689
Organizational development	145,388	88,790	12,892	247,070
Authorizer fees	-	360,503	-	360,503
Interest cost	242,358	-	-	242,358
Athletic cost	83,679	-	-	83,679
Outreach	63,682	11,238	-	74,920
Miscellaneous	42,172	(13,288)	-	28,884
Staff development	-	-	13,187	13,187
<b>Total Expenses</b>	<b>\$ 30,610,836</b>	<b>\$ 3,644,565</b>	<b>\$ 274,102</b>	<b>\$ 34,529,503</b>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENTS OF CASH FLOWS**

YEARS ENDED JUNE 30, 2022 AND 2020

	<b>2022</b>	<b>2021</b>
<b>Cash flows from operating activities:</b>		
Change in net assets	\$ 11,341,456	\$ 8,212,984
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Depreciation and amortization	1,380,573	1,324,232
Loss on disposal of asset	93,842	-
Noncash lease expense	254,624	-
Changes in operating assets and liabilities:		
Accounts receivable	(8,135,331)	(1,904,329)
Prepaid expenses and other	(417,263)	(35,113)
Accounts payable	276,224	619,007
Accrued expenses	567,597	444,054
Net cash flows from operating activities	<u>5,361,722</u>	<u>8,660,835</u>
<b>Cash flows from investing activities:</b>		
Purchase of property and equipment	<u>(877,001)</u>	<u>(1,251,133)</u>
Net cash flows from investing activities	<u>(877,001)</u>	<u>(1,251,133)</u>
<b>Cash flows from financing activities:</b>		
Proceeds from notes payable	-	300,000
Payments on notes payable	<u>(5,837,961)</u>	<u>(158,001)</u>
Net cash flows from financing activities	<u>(5,837,961)</u>	<u>141,999</u>
Net change in cash and cash equivalents	(1,353,240)	7,551,701
Cash and cash equivalents, beginning of year	<u>12,438,933</u>	<u>4,887,232</u>
Cash and cash equivalents, end of year	<u>\$ 11,085,693</u>	<u>\$ 12,438,933</u>
<b>Supplemental disclosure of cash flow information:</b>		
Cash paid during the year for interest	<u>\$ 258,749</u>	<u>\$ 242,358</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2022 AND 2021

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### **Note 1—Nature of operations and summary of significant accounting policies**

LEAD Public Schools, Inc. (“LPS”) was incorporated during 2010 as a charter management organization that starts and operates public charter schools in Middle Tennessee. Public charter schools in Tennessee are public schools operated under a charter contract with a local district, statewide district, or the state board of education, and governed under a nonprofit Board of Directors separate from the district. Currently, LPS operates five charter schools as single member limited liability corporations consisting of LEAD Academy, Nonprofit, LLC (the “Academy”); Cameron College Prep, Nonprofit, LLC (“Cameron”); Brick Church College Prep, Nonprofit, LLC (“Brick Church”); LEAD Prep Southeast, Nonprofit, LLC (“Southeast”); and Neely’s Bend College Prep, Nonprofit, LLC (“Neely’s Bend”). In addition, LPS operates a real estate holding company, LEAD Real Estate Holdings, Nonprofit, LLC (“LEAD Real Estate”).

Academy, Cameron, Brick Church, Southeast, and Neely’s Bend were organized in accordance with Section 6(1)(a) of the Tennessee Public Charter School Act of 2002 (the “Act”). Pursuant to the Act, public charter schools are part of the state’s public education program offering an alternative means within the public school system for accomplishing necessary outcomes of education. Academy entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on July 23, 2006 to operate a charter school in Nashville, Tennessee. Academy began classes in July 2007 with fifth and sixth grade classes. Academy began classes in July 2007 with fifth and sixth grade classes and has since transitioned to serving ninth through twelfth grades. Cameron entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 1, 2010, to operate a charter school in Nashville, Tennessee. Cameron began classes in August 2011 with fifth grade and has since added a grade each year through the eighth grade. Brick Church entered into a Charter School Agreement with the Tennessee Achievement School District (“ASD”) on June 1, 2012 to operate a charter school in Nashville, Tennessee. Brick Church began classes in August 2012 with fifth grade and has since added a grade each year through the eighth grade. Southeast entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 25, 2011, to operate a charter school in Nashville, Tennessee. Southeast began classes in August 2013 and currently enrolls students from fifth grade through the twelfth grade. Neely’s Bend entered into a Charter School Agreement with the Tennessee Achievement School District on May 21, 2015, to operate a charter school in Madison, Tennessee. Neely’s Bend began classes in August 2015 with fifth grade and has since added a grade each year through the eighth grade.

In accordance with the charter agreements of Academy, Cameron, and Southeast enrollment is open to any student within the Metropolitan Nashville Public Schools (“MNPS”) System who resides in Davidson County. Brick Church and Neely’s Bend enrollment is restricted to students who would have been zoned to Brick Church Middle School, Neely’s Bend Middle School, respectively, or other ASD Priority School. If space exists after planned enrollment of zoned students, other eligible students may enroll or be included in an enrollment lottery pursuant to T.C.A. Section 49-13-106. Academy currently enrolls students in grades nine through twelve. Academy’s charter provides for a total enrollment of 458. Cameron currently enrolls students in grades five through nine. Cameron’s charter provides for a total enrollment of 627. Brick Church currently enrolls students in grades five through nine. Brick Church’s charter provides for a total enrollment of 275. Southeast currently enrolls students in grades five through twelve. Southeast’s charter provides for a total enrollment of 805. Neely’s Bend currently enrolls students in grades five through nine. Neely’s Bend’s charter provides for a total enrollment of 465.

*Basis of Presentation* – The accompanying consolidated financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America (“U.S. GAAP”). The consolidated financial statements present the financial position and results of operations of LPS, Academy, Cameron, Brick Church, Southeast, Neely’s Bend, and LEAD Real Estate (collectively, the “Organization”).

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

JUNE 30, 2022 AND 2021

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**Note 1—Nature of operations and summary of significant accounting policies (continued)**

The Organization presents its consolidated financial statements in accordance with Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”) guidance for not-for-profit organizations. Under this guidance, net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

*Net Assets Without Donor Restrictions* – Net assets that are not subject to donor-imposed stipulations. All contributions are considered available for general use unless specifically restricted by the donor.

*Net Assets With Donor Restrictions* – Net assets subject to donor-imposed stipulations that may or will be met, either by actions of the Organization and/or the passage of time. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions. If a restriction is fulfilled in the same time period in which the contribution is received, the support is reported as increases to net assets without donor restrictions. Additionally, some net assets are subject to a donor-imposed stipulation that they be held in perpetuity by the Organization. There were no net assets that were required to be held in perpetuity at June 30, 2022 or 2021.

*Use of Estimates* – The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements, and the reported amounts of revenues and expenses and allocation of functional expenses during the reporting period. Actual results could differ from those estimates.

*Cash and Cash Equivalents* – For purposes of the consolidated statements of cash flows, the Organization considers all highly-liquid investments with original maturities when purchased of less than three months to be cash equivalents. The cash accounts are held primarily by financial institutions and at times may exceed amounts that are federally insured.

*Accounts Receivable* – Accounts receivable represent amounts due from grants or other sources which have been approved but not received. Management considers all accounts collectible and, therefore, an allowance for doubtful accounts has not been recognized in the consolidated financial statements.

*Property and Equipment* – Property and equipment are recorded at acquisition cost less accumulated depreciation, if purchased, or the fair value on the date received, if donated. The cost of routine maintenance and repairs is expensed as incurred. Expenditures which materially extend the economic lives, change capacities, or improve the efficiency of the related assets are capitalized. Upon sale or retirement, the cost and related accumulated depreciation are removed from the respective accounts, and the resulting gain or loss, if any, is included in the consolidated statement of activities. Depreciation is provided using the straight-line method over the estimated useful lives of the assets, ranging from three to seven years, or over the term of the lease for leasehold improvements, if less.

*Donated Materials, Services, and Assets* – Donated materials and services, if any, are reflected as contributions in the accompanying consolidated financial statements at their estimated values at the date of receipt. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation and are recorded at their fair values in the period received.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

*JUNE 30, 2022 AND 2021*

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**Note 1—Nature of operations and summary of significant accounting policies (continued)**

Donations of property and equipment are recorded as support at their estimated fair value. Such donations are reported as net assets without donor restrictions unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restrictions. Absent donor stipulations regarding how long those donated assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Organization reclassifies net assets with donor restrictions to net assets without donor restrictions at that time.

*Contributions* – Contributions and unconditional promises to give are recognized as revenue when made or a written promise to give is conveyed, whichever is earliest. Contributions of assets other than cash are recorded at estimated fair value at the date of donation. Contributions received with donor stipulations that restrict the use of the assets and promises to give that have time or purpose restrictions are reported as revenue with donor restrictions. When the use or time restriction is met, the amount is reported as revenue without donor restrictions and a reduction in revenue with donor restrictions. The Organization recognizes contributions when cash, securities, or other assets or an unconditional promise to give are received. Conditional promises to give – that is, those with a measurable performance or other barrier and a right of return – are not recognized until the conditions on which they depend have been met. At December 31, 2022 and 2021, the Organization did not have any conditional promises to give.

*Grants* – The Organization receives federal financial assistance through state agencies. The expenditure of funds received under these programs generally requires compliance with terms and conditions specified in the grant agreements and are subject to audit by the grantor agencies.

*Functional Allocation of Expenses* – The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. While most costs have been directly assigned to a functional category, certain joint costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis. Expenses that are allocated consist primarily of salaries and wages which are allocated based on time and effort.

*Income Taxes* – The Organization is exempt from federal income taxes under the provisions of Internal Revenue Code Section 501(c)(3) and, accordingly, no provision for income taxes is included in the consolidated financial statements.

The Organization follows FASB ASC guidance clarifying the accounting for uncertainty in income taxes recognized in an entity's financial statements. This guidance prescribes a minimum probability threshold that a tax position must meet before a financial statement benefit is recognized. The minimum threshold is defined as a tax position that is more likely than not to be sustained upon examination by the applicable taxing authority, including resolution of any related appeals or litigation processes, based on the technical merits of the position. The tax benefit to be recognized is measured as the largest amount of benefit that is greater than 50% likely of being realized upon ultimate settlement. The Organization has no tax penalties or interest reported in the accompanying consolidated financial statements.



**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

JUNE 30, 2022 AND 2021

**Note 1—Nature of operations and summary of significant accounting policies (continued)**

*Change in Accounting Principles* – In February 2016, FASB issued ASU 2016-02, *Leases (Topic 842)*, which supersedes existing guidance for accounting for leases under *Topic 840, Leases*. FASB also subsequently issued additional ASUs which amend and clarify Topic 842. The most significant change in the new leasing guidance is the requirement to recognize right-to-use (“ROU”) assets and lease liabilities for operating leases on the balance sheet.

The Organization adopted these ASUs effective July 1, 2021 using the modified retrospective approach. As a result of adopting these ASUs, the Organization recorded ROU assets and lease liabilities of approximately \$4,634,965. Adoption of the new standard did not materially impact the Organizations change in net assets and had no impact on cash flows.

*Subsequent Events* – The Organization evaluated subsequent events through March 30, 2023, when these consolidated financial statements were available to be issued.

**Note 2—Liquidity and availability of resources**

The Organization regularly monitors liquidity required to meet its operating needs and other contractual commitments. For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Organization considers all expenditures related to its ongoing program service activities as well as the conduct of services undertaken to support those activities to be general expenditures. The Organization maintains a line of credit with maximum borrowings of \$1,000,000 (see Note 6) with a financial institution that is drawn upon during the year to manage cash flow, if needed. Financial assets available for general expenditure, that is, without donor restrictions or other restrictions limiting their use within one year of the consolidated statements of financial position, comprise the following at June 30:

	<u>2022</u>	<u>2021</u>
Financial assets at June 30:		
Cash and cash equivalents	\$ 11,085,693	\$ 12,438,933
Accounts receivable	11,516,319	3,380,988
Total financial assets	22,602,012	15,819,921
Less amounts not available to be used for general expenditures within one year	<u>-</u>	<u>(45,000)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 22,602,012</u>	<u>\$ 15,774,921</u>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

JUNE 30, 2022 AND 2021

**Note 3—Property and equipment**

Property and equipment, net consists of the following at June 30:

	<u>2022</u>	<u>2021</u>
Land	\$ 542,960	\$ 542,960
Buildings and improvements	8,688,103	8,207,072
Computer equipment	2,794,355	3,487,863
Furniture and fixtures	299,319	425,304
Office equipment	119,281	184,162
Textbooks	-	166,177
Leasehold improvements	1,607,868	1,665,092
School buses	-	426,284
	<u>14,051,886</u>	<u>15,104,914</u>
Less accumulated depreciation	<u>(6,516,778)</u>	<u>(6,972,392)</u>
	<u>\$ 7,535,108</u>	<u>\$ 8,132,522</u>

Depreciation expense totaled \$1,380,573 and \$1,324,233 for the years ended June 30, 2022 and 2021, respectively.

**Note 4—Leases**

The Organization leases building space for school activity use. The Organization determines whether a contract contains a lease at inception by determining if the contract conveys the right to control the use of identified property, plant or equipment for a period of time in exchange for consideration. The Organization has elected to account for lease and non-lease components as a single component.

Right-of-use (“ROU”) assets and lease liabilities are recognized at the commencement date based on the present value of the future minimum lease payments over the lease term. Renewal and termination clauses that are factored into the determination of the lease term if it is reasonably certain that these options would be exercised by the Organization. Lease assets are amortized over the lease term unless there is a transfer of title or purchase option reasonably certain of exercise, in which case the asset life is used. Certain of our lease agreements include variable payments. Variable lease payments not dependent on an index or rate primarily consist of common area maintenance charges and are not included in the calculation of the ROU asset and lease liability and are expensed as incurred. In order to determine the present value of lease payments, the Organization uses the implicit rate when it is readily determinable. As most of the Organization’s leases do not provide an implicit rate, management uses the Organization’s incremental borrowing rate based on the information available at lease commencement to determine the present value of lease payments.

The lease agreements do not contain any material residual value guarantees or material restrictive covenants. The Organization does not have leases where it is involved with the construction or design of an underlying asset. The Organization has no material obligation for leases signed but not yet commenced as of June 30, 2022. The Organization does not have any sublease activities.

The Organization has elected the practical expedient not to recognize leases with terms of 12 months or less on the statement of financial position and instead recognize the lease payments on a straight-line basis over the term of the lease and variable lease payments in the period in which the obligation for the payments is incurred. Therefore, short-term lease expense for the period does not reflect ongoing short-term lease commitments. Lease expense for such short-term leases was not material for the year ended June 30, 2022.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

JUNE 30, 2022 AND 2021

**Note 4—Leases**

As of June 30, 2022, future minimum operating lease payments required are as follows:

<u>Years Ending June 30,</u>	
2023	\$ 635,322
2024	653,062
2025	671,307
2026	550,013
2027	566,514
Thereafter	<u>2,441,184</u>
Total lease payments	5,517,402
Less interest	<u>(1,163,202)</u>
Present value of lease liabilities	<u>\$ 4,354,200</u>

Required supplemental information relating to our leases for the years ended June 30, 2022 is as follows:

**Operating:**

Operating leases, included in operating expenses	\$ 743,531
Short-term leases, included in operating expenses	<u>129,394</u>
Net operating lease cost	<u>\$ 872,925</u>

**Lease Term and Discount Rate:**

(in years)

Weighted average remaining lease term - operating leases	6.00
Weighted average discount rate - operating leases	5.50%

**Note 5—Notes payable**

In February 2014, the Organization entered into a note payable with a financial institution for the purchase of certain real estate. During September 2015, this note payable was restructured to a term loan with total borrowings of \$3,900,000 requiring monthly payments of \$24,753 including interest calculated at 4.00%. During July 2017, this term loan was amended to allow additional borrowings of \$2,460,000 and requiring new monthly payments of \$33,363 including interest calculated at 4.25%. Total outstanding amounts plus accrued and unpaid interest were paid off on May 27, 2022. The agreement is secured by a deed of trust and a negative pledge of the Organization's assets. During FY22, the Organization paid this debt in full. Amounts outstanding under this note totaled \$-0- and \$5,537,961 at June 30, 2022 and 2021, respectively. Additionally, the agreement contains restrictive covenants that are tested annually on June 30. At June 30, 2022, management believes the Organization was in compliance with the other covenants.

During June 2020, the Organization entered into a loan agreement with CSGF Tennessee, LLC. In July 2020, under terms of the loan, the Organization received \$300,000 to be used for general support and management of the Organization. This note bears no interest. Amounts outstanding under the agreement totaled \$300,000 at June 30, 2021. Total outstanding amounts plus accrued and unpaid interest were paid off in full on May 27, 2022.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2022 AND 2021

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### Note 6—Line of credit

The Organization's line of credit has a \$1,000,000 maximum availability and requires interest-only payments in monthly installments at the bank's prime rate with minimum rate of 4.5% until maturity in April 2023 at which time all outstanding principal and interest will be due. There was no balance outstanding on the line of credit as of June 30, 2022 or 2021.

### Note 7—Federal grants

The Organization receives federal pass-through funding from various grantor agencies to help meet objectives and accomplish its mission as a charter school. Total federal awards received during the years ended June 30 2022 and 2021 totaled \$12,180,680 and \$4,885,320, respectively.

### Note 8—Concentrations

For the years ended June 30, 2022 and 2021, the Organization received \$38,968,491 (74%) and \$36,537,917 (85%), respectively, of its funding for operations from MNPS and ASD based on the state of Tennessee's Basic Education Program ("BEP"). BEP funding is designated to schools based on student enrollment.

### Note 9—Retirement plans

#### Teacher Legacy Pension Plan of TCRS

*Plan Description* – The Tennessee Consolidated Retirement System ("TCRS") was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies ("LEA") after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

#### Teacher Retirement Plan of TCRS

*Benefits Provided* – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with five years of service credit or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments ("COLA") after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the consumer price index ("CPI") during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2022 AND 2021

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### Note 9—Retirement plans (continued)

*Contributions* – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions for the Teacher Legacy Pension Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2022 and 2021, to the Teacher Legacy Pension Plan were \$222,215 and \$227,037, respectively, which is 10.27% and 10.63% of covered payroll, respectively. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

*Plan Description* – The TCRS was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with memberships in TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by LEAs after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

*Benefits Provided* – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with five years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic COLAs after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the CPI during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

*Contributions* – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer-contribution rate cannot be less than 4%, except for in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions for the Teacher Retirement Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

*JUNE 30, 2022 AND 2021*

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**Note 9—Retirement plans (continued)**

Employer contributions by the Organization for the years ended June 30, 2022 and 2021, to the Teacher Retirement were \$173,991 and \$139,522, respectively, which is 2.03% of covered payroll for both years. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Members of the Teacher Retirement Plan are also included in a 401(k) component whereby employer contributions are made at 5% of covered payroll.

**Other Plan**

The Organization's noncertified employees are covered under a 403(b) plan. Under terms of the plan, employee contributions are matched 200% up to a maximum match of 6% of eligible compensation by the Organization.

Employer contributions for all retirement plans totaled \$1,127,069 and \$1,007,316 for the years ended June 30, 2022 and 2021, respectively.

**LEAD PUBLIC SCHOOLS, INC.  
AND AFFILIATES**

**CONSOLIDATED FINANCIAL STATEMENTS**

*As of and for the Years Ended June 30, 2021 and 2020*

*And Report of Independent Auditor*

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
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## Report of Independent Auditor

To the Board of Directors  
LEAD Public Schools, Inc. and Affiliates  
Nashville, Tennessee

### **Report on the Consolidated Financial Statements**

We have audited the accompanying consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statements of financial position as of June 30, 2021 and 2020, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

### ***Management's Responsibility for the Consolidated Financial Statements***

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

### ***Auditor's Responsibility***

Our responsibility is to express an opinion on these consolidated financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Opinion***

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of LEAD Public Schools, Inc. and Affiliates as of June 30, 2021 and 2020, and the changes in their net assets and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

**Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated December 20, 2021, on our consideration of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and compliance.

*Cheryl Behant LLP*

Nashville, Tennessee  
December 20, 2021

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENTS OF FINANCIAL POSITION**

*JUNE 30, 2021 AND 2020*

	<u>2021</u>	<u>2020</u>
<b>ASSETS</b>		
Current Assets:		
Cash and cash equivalents	\$ 12,438,933	\$ 4,887,232
Accounts receivable	3,380,988	1,476,659
Prepaid expenses and other	80,811	45,698
Total Current Assets	15,900,732	6,409,589
Property and equipment, net	8,132,522	8,205,621
<b>Total Assets</b>	<u><u>\$ 24,033,254</u></u>	<u><u>\$ 14,615,210</u></u>
<b>LIABILITIES AND NET ASSETS</b>		
Current Liabilities:		
Accounts payable	\$ 1,065,088	\$ 446,081
Accrued expenses	1,321,117	877,063
Notes payable, current portion	164,947	158,002
Total Current Liabilities	2,551,152	1,481,146
Notes payable, noncurrent portion	5,673,014	5,537,960
Total Liabilities	8,224,166	7,019,106
Net Assets:		
Without donor restriction	15,764,088	7,596,104
With donor restriction	45,000	-
Total Net Assets	15,809,088	7,596,104
<b>Total Liabilities and Net Assets</b>	<u><u>\$ 24,033,254</u></u>	<u><u>\$ 14,615,210</u></u>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**

*YEAR ENDED JUNE 30, 2021*

	<b>Without Donor Restriction</b>	<b>With Donor Restriction</b>	<b>Total</b>
<b>Public Support and Revenue:</b>			
District funding	\$ 37,074,425	\$ -	\$ 37,074,425
Federal grants	4,885,320	-	4,885,320
Contributions and other	482,742	300,000	782,742
Net assets released from restrictions	255,000	(255,000)	-
<b>Total Public Support and Revenue</b>	<b>42,697,487</b>	<b>45,000</b>	<b>42,742,487</b>
<b>Expenses:</b>			
Student instruction and services	30,610,836	-	30,610,836
Administration	3,644,565	-	3,644,565
Fundraising	274,102	-	274,102
<b>Total Expenses</b>	<b>34,529,503</b>	<b>-</b>	<b>34,529,503</b>
Change in net assets	8,167,984	45,000	8,212,984
Net assets, beginning of year	7,596,104	-	7,596,104
<b>Net assets, end of year</b>	<b>\$ 15,764,088</b>	<b>\$ 45,000</b>	<b>\$ 15,809,088</b>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**

*YEAR ENDED JUNE 30, 2020*

	<b>Without Donor Restriction</b>	<b>With Donor Restriction</b>	<b>Total</b>
<b>Public Support and Revenue:</b>			
District funding	\$ 29,788,783	\$ -	\$ 29,788,783
Federal grants	2,886,114	-	2,886,114
Contributions and other	1,101,824	-	1,101,824
Net assets released from restrictions	400,000	(400,000)	-
<b>Total Public Support and Revenue</b>	<b>34,176,721</b>	<b>(400,000)</b>	<b>33,776,721</b>
<b>Expenses:</b>			
Student instruction and services	29,872,795	-	29,872,795
Administration	3,305,392	-	3,305,392
Fundraising	262,316	-	262,316
<b>Total Expenses</b>	<b>33,440,503</b>	<b>-</b>	<b>33,440,503</b>
Change in net assets	736,218	(400,000)	336,218
Net assets, beginning of year	6,859,886	400,000	7,259,886
Net assets, end of year	<b>\$ 7,596,104</b>	<b>\$ -</b>	<b>\$ 7,596,104</b>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES**

*YEAR ENDED JUNE 30, 2021*

	<b>Student Instruction and Services</b>	<b>Supporting Services</b>		<b>Total Expenses</b>
		<b>Administration</b>	<b>Fundraising</b>	
Salaries, wages, and benefits	\$ 22,389,857	\$ 1,829,703	\$ 183,007	\$ 24,402,567
Occupancy	2,417,364	103,811	-	2,521,175
Professional and service fees	1,051,126	968,811	56,645	2,076,582
Transportation	1,783,813	3,385	-	1,787,198
Depreciation	1,255,027	69,205	-	1,324,232
Instructional	645,426	114,114	6,919	766,459
Office supplies and equipment	490,944	108,293	1,452	600,689
Organizational development	145,388	88,790	12,892	247,070
Authorizer fees	-	360,503	-	360,503
Interest cost	242,358	-	-	242,358
Athletic cost	83,679	-	-	83,679
Outreach	63,682	11,238	-	74,920
Miscellaneous	42,172	(13,288)	-	28,884
Staff development	-	-	13,187	13,187
<b>Total Expenses</b>	<b>\$ 30,610,836</b>	<b>\$ 3,644,565</b>	<b>\$ 274,102</b>	<b>\$ 34,529,503</b>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES**

YEAR ENDED JUNE 30, 2020

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 21,017,494	\$ 1,349,409	\$ 186,276	\$ 22,553,179
Occupancy	2,379,600	84,391	-	2,463,991
Professional and service fees	1,321,907	929,814	37,021	2,288,742
Transportation	2,012,224	9,868	322	2,022,414
Depreciation	1,175,302	139,330	-	1,314,632
Instructional	566,467	191,665	3,621	761,753
Office supplies and equipment	649,235	91,270	448	740,953
Organizational development	223,483	167,939	27,113	418,535
Authorizer fees	-	320,184	-	320,184
Interest cost	251,796	-	-	251,796
Athletic cost	220,667	-	-	220,667
Outreach	34,570	6,101	-	40,671
Miscellaneous	20,050	15,421	-	35,471
Staff development	-	-	7,515	7,515
<b>Total Expenses</b>	<b>\$ 29,872,795</b>	<b>\$ 3,305,392</b>	<b>\$ 262,316</b>	<b>\$ 33,440,503</b>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENTS OF CASH FLOWS**

YEARS ENDED JUNE 30, 2021 AND 2020

	<u>2021</u>	<u>2020</u>
<b>Cash flows from operating activities:</b>		
Change in net assets	\$ 8,212,984	\$ 336,218
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Depreciation	1,324,232	1,314,632
Changes in operating assets and liabilities:		
Accounts receivable	(1,904,329)	60,657
Prepaid expenses and other	(35,113)	414,364
Accounts payable	619,007	84,046
Accrued expenses	444,054	(797,806)
Other current liabilities	-	(127,304)
Net cash flows from operating activities	<u>8,660,835</u>	<u>1,284,807</u>
<b>Cash flows from investing activities:</b>		
Purchase of property and equipment	<u>(1,251,133)</u>	<u>(1,612,082)</u>
Net cash flows from investing activities	<u>(1,251,133)</u>	<u>(1,612,082)</u>
<b>Cash flows from financing activities:</b>		
Proceeds from notes payable	300,000	-
Payments on notes payable	<u>(158,001)</u>	<u>(162,616)</u>
Net cash flows from financing activities	<u>141,999</u>	<u>(162,616)</u>
Net change in cash and cash equivalents	7,551,701	(489,891)
Cash and cash equivalents, beginning of year	<u>4,887,232</u>	<u>5,377,123</u>
Cash and cash equivalents, end of year	<u>\$ 12,438,933</u>	<u>\$ 4,887,232</u>
<b>Supplemental disclosure of cash flow information:</b>		
Cash paid during the year for interest	<u>\$ 242,358</u>	<u>\$ 251,796</u>



# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

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### Note 1—Nature of operations and summary of significant accounting policies

LEAD Public Schools, Inc. (“LPS”) was incorporated during 2010 as a charter management organization that starts and operates public charter schools in Middle Tennessee. Public charter schools in Tennessee are public schools operated under a charter contract with a local district, statewide district, or the state board of education, and governed under a nonprofit Board of Directors separate from the district. Currently, LPS operates five charter schools as single member limited liability corporations consisting of LEAD Academy, Nonprofit, LLC (the “Academy”); Cameron College Prep, Nonprofit, LLC (“Cameron”); Brick Church College Prep, Nonprofit, LLC (“Brick Church”); LEAD Prep Southeast, Nonprofit, LLC (“Southeast”); and Neely’s Bend College Prep, Nonprofit, LLC (“Neely’s Bend”). In addition, LPS operates a real estate holding company, LEAD Real Estate Holdings, Nonprofit, LLC (“LEAD Real Estate”).

The Academy, Cameron, Brick Church, Southeast, and Neely’s Bend were organized in accordance with Section 6(1)(a) of the Tennessee Public Charter School Act of 2002 (the “Act”). Pursuant to the Act, public charter schools are part of the state’s public education program offering an alternative means within the public school system for accomplishing necessary outcomes of education. The Academy entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on July 23, 2006 to operate a charter school in Nashville, Tennessee. The Academy began classes in July 2007 with fifth and sixth grade classes. The Academy has since added a grade each year until it reached twelfth grade. Cameron entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 1, 2010, to operate a charter school in Nashville, Tennessee. Cameron began classes in August 2011 with fifth grade and has since added a grade each year through the eighth grade. Brick Church entered into a Charter School Agreement with the Tennessee Achievement School District (“ASD”) on June 1, 2012 to operate a charter school in Nashville, Tennessee. Brick Church began classes in August 2012 with fifth grade and has since added a grade each year through the eighth grade. Southeast entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 25, 2011, to operate a charter school in Nashville, Tennessee. Southeast began classes in August 2013 and currently enrolls students from fifth grade through the twelfth grade. Neely’s Bend entered into a Charter School Agreement with the Tennessee Achievement School District on May 21, 2015, to operate a charter school in Madison, Tennessee. Neely’s Bend began classes in August 2015 with fifth grade and has since added a grade each year through the eighth grade.

In accordance with the charter agreements of the Academy, Cameron, and Southeast enrollment is open to any student within the Metropolitan Nashville Public Schools (“MNPS”) System who resides in Davidson County. Brick Church and Neely’s Bend enrollment is restricted to students who would have been zoned to Brick Church Middle School, Neely’s Bend Middle School, respectively, or other ASD Priority School. If space exists after planned enrollment of zoned students, other eligible students may enroll or be included in an enrollment lottery pursuant to T.C.A. Section 49-13-106. The Academy currently enrolls students in grades nine through twelve. The Academy’s charter provides for a total enrollment of 472. Cameron currently enrolls students in grades five through nine. Cameron’s charter provides for a total enrollment of 683. Brick Church currently enrolls students in grades five through nine. Brick Church’s charter provides for a total enrollment of 332. Southeast currently enrolls students in grades five through twelve. Southeast’s charter provides for a total enrollment of 865. Neely’s Bend currently enrolls students in grades five through nine. Neely’s Bend’s charter provides for a total enrollment of 488.

*Basis of Presentation* – The accompanying consolidated financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America (“U.S. GAAP”). The consolidated financial statements present the financial position and results of operations of LPS, the Academy, Cameron, Brick Church, Southeast, Neely’s Bend, and LEAD Real Estate (collectively, the “Organization”).

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

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### **Note 1—Nature of operations and summary of significant accounting policies (continued)**

The Organization presents its consolidated financial statements in accordance with Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”) guidance for not-for-profit organizations. Under this guidance, net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

*Net Assets Without Donor Restriction* – Net assets that are not subject to donor-imposed stipulations. All contributions are considered available for general use unless specifically restricted by the donor.

*Net Assets With Donor Restriction* – Net assets subject to donor-imposed stipulations that may or will be met, either by actions of the Organization and/or the passage of time. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restriction and reported in the statements of activities as net assets released from restriction. If a restriction is fulfilled in the same time period in which the contribution is received, the support is reported as increases to net assets without donor restriction. Additionally, some net assets are subject to a donor-imposed stipulation that they be held in perpetuity by the Organization. There were no net assets that were required to be held in perpetuity at June 30, 2021 or 2020.

*Use of Estimates* – The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements, and the reported amounts of revenues and expenses and allocation of functional expenses during the reporting period. Actual results could differ from those estimates.

*Cash and Cash Equivalents* – For purposes of the consolidated statements of cash flows, the Organization considers all highly-liquid investments with original maturities when purchased of less than three months to be cash equivalents. The cash accounts are held primarily by financial institutions and at times may exceed amounts that are federally insured.

*Accounts Receivable* – Accounts receivable represent amounts due from grants or other sources which have been approved but not received. Management considers all accounts collectible and, therefore, an allowance for doubtful accounts has not been recognized in the consolidated financial statements.

*Property and Equipment* – Property and equipment are recorded at acquisition cost less accumulated depreciation, if purchased, or the fair value on the date received, if donated. The cost of routine maintenance and repairs is expensed as incurred. Expenditures which materially extend the economic lives, change capacities, or improve the efficiency of the related assets are capitalized. Upon sale or retirement, the cost and related accumulated depreciation are removed from the respective accounts, and the resulting gain or loss, if any, is included in the consolidated statement of activities. Depreciation is provided using the straight-line method over the estimated useful lives of the assets, ranging from three to seven years, or over the term of the lease for leasehold improvements, if less.

*Donated Materials, Services, and Assets* – Donated materials and services, if any, are reflected as contributions in the accompanying consolidated financial statements at their estimated values at the date of receipt. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation, and are recorded at their fair values in the period received.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

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### **Note 1—Nature of operations and summary of significant accounting policies (continued)**

Donations of property and equipment are recorded as support at their estimated fair value. Such donations are reported as net assets without donor restriction unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restriction. Absent donor stipulations regarding how long those donated assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Organization reclassifies net assets with donor restriction to net assets without donor restriction at that time.

*Contributions* – Contributions and unconditional promises to give are recognized as revenue when made or a written promise to give is conveyed, whichever is earliest. Contributions of assets other than cash are recorded at estimated fair value at the date of donation. Contributions received with donor stipulations that restrict the use of the assets and promises to give that have time or purpose restrictions are reported as revenue with donor restrictions. When the use or time restriction is met, the amount is reported as revenue without donor restrictions and a reduction in revenue with donor restrictions. The Organization recognizes contributions when cash, securities, or other assets or an unconditional promise to give are received. Conditional promises to give – that is, those with a measurable performance or other barrier and a right of return – are not recognized until the conditions on which they depend have been met. At December 31, 2021 and 2020, the Organization did not have any conditional promises to give.

*Grants* – The Organization receives federal financial assistance through state agencies. The expenditure of funds received under these programs generally requires compliance with terms and conditions specified in the grant agreements and are subject to audit by the grantor agencies.

*Functional Allocation of Expenses* – The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. While most costs have been directly assigned to a functional category, certain joint costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis. Expenses that are allocated consist primarily of salaries and wages which are allocated based on time and effort.

*Income Taxes* – The Organization is exempt from federal income taxes under the provisions of Internal Revenue Code Section 501(c)(3) and, accordingly, no provision for income taxes is included in the consolidated financial statements.

The Organization follows FASB ASC guidance clarifying the accounting for uncertainty in income taxes recognized in an entity's financial statements. This guidance prescribes a minimum probability threshold that a tax position must meet before a financial statement benefit is recognized. The minimum threshold is defined as a tax position that is more likely than not to be sustained upon examination by the applicable taxing authority, including resolution of any related appeals or litigation processes, based on the technical merits of the position. The tax benefit to be recognized is measured as the largest amount of benefit that is greater than 50% likely of being realized upon ultimate settlement. The Organization has no tax penalties or interest reported in the accompanying consolidated financial statements.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

JUNE 30, 2021 AND 2020

**Note 1—Nature of operations and summary of significant accounting policies (continued)**

*Adoption of New Accounting Pronouncement – Accounting Policies for Future Pronouncements* – In May 2014, FASB issued Accounting Standards Update (“ASU”) 2014-09, *Revenue from Contracts with Customers*. ASU 2014-09 clarifies the principles for recognizing revenue and develops a common revenue standard under U.S. GAAP under which an entity should recognize revenue to depict the transfer of promised goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services. ASU 2014-09 is effective for the Organization for the year ending June 30, 2021. The adoption of this standard did not have a significant impact on the Organization’s consolidated financial statements.

*Accounting Policies for Future Pronouncements* – In February 2016, FASB issued ASU 2016-02, *Leases*. The standard requires all leases with lease terms over 12 months to be capitalized as a right-of-use asset and lease liability on the statement of financial position at the date of lease commencement. Leases will be classified as either finance or operating. This distinction will be relevant for the pattern of expense recognition in the statement of activities. This standard will be effective for the year ending June 30, 2023. The Organization is currently evaluating the effect of the implementation of this new standard.

*Subsequent Events* – The Organization evaluated subsequent events through December 20, 2021, when these consolidated financial statements were available to be issued.

**Note 2—Liquidity and availability of resources**

The Organization regularly monitors liquidity required to meet its operating needs and other contractual commitments. For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Organization considers all expenditures related to its ongoing program service activities as well as the conduct of services undertaken to support those activities to be general expenditures. The Organization maintains a line of credit with maximum borrowings of \$1,000,000 (see Note 6) with a financial institution that is drawn upon during the year to manage cash flow, if needed. Financial assets available for general expenditure, that is, without donor restriction or other restrictions limiting their use within one year of the consolidated statements of financial position, comprise the following at June 30:

	<u>2021</u>	<u>2020</u>
Financial assets at June 30:		
Cash and cash equivalents	\$ 12,438,933	\$ 4,887,232
Accounts receivable	3,380,988	1,476,659
Total financial assets	15,819,921	6,363,891
Less amounts not available to be used for general expenditures within one year	<u>(45,000)</u>	<u>-</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 15,774,921</u>	<u>\$ 6,363,891</u>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

*JUNE 30, 2021 AND 2020*

**Note 3—Property and equipment**

Property and equipment, net consists of the following at June 30:

	<b>2021</b>	<b>2020</b>
Land	\$ 542,960	\$ 542,960
Buildings and improvements	8,207,072	8,159,459
Computer equipment	3,487,863	2,687,904
Furniture and fixtures	425,304	421,224
Office equipment	184,162	138,962
Textbooks	166,177	166,177
Leasehold improvements	1,665,092	1,357,296
School buses	426,284	426,284
	<u>15,104,914</u>	<u>13,900,266</u>
Less accumulated depreciation	<u>(6,972,392)</u>	<u>(5,694,645)</u>
	<u><u>\$ 8,132,522</u></u>	<u><u>\$ 8,205,621</u></u>

Depreciation expense totaled \$1,324,233 and \$1,314,632 for the years ended June 30, 2021 and 2020, respectively.

**Note 4—Operating leases**

During 2014, Cameron entered into a lease arrangement with MNPS for certain educational facilities starting July 1, 2014 and expires June 30, 2021. The lease requires monthly rent payments of \$31,417 subject to annual increases of 2%. Effective July 1, 2015, this lease was amended permitting the Academy's ninth grade to use a portion of Cameron's leased space. The amendment required monthly rental payments of \$25,957 from Cameron and \$10,347 from the Academy subject to annual increases of 2%. The amendment also gave the Organization the right to terminate the lease subject to a 60-day written notice. Effective July 1, 2017, the lease was amended permitting the Academy's tenth through twelfth grades to use a portion of Cameron's leased space. The amendment requires monthly rental payments of \$21,982 from Cameron and \$23,371 from the Academy subject to annual increases of 2%. Effective July 1, 2018, the lease was amended reducing the monthly rental payment to \$21,468 subject to annual increases of 2%. Effective July 1, 2021, the lease was amended increasing the monthly rental payment to \$31,459 subject to annual increases of 3% and expiring June 30, 2031. Under the terms of the lease, rent expense totaled \$290,828 and \$262,768 for the years ended June 30, 2021 and 2020, respectively.

As of June 30, 2021, future minimum operating lease payments required are as follows:

<b><u>Year Ending June 30,</u></b>	
2022	\$ 377,505
2023	388,830
2024	400,495
2025	412,510
2026	424,885
Thereafter	<u>2,323,446</u>
	<u><u>\$ 4,327,671</u></u>

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

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### Note 5—Notes payable

In February 2014, the Organization entered into a note payable with a financial institution for the purchase of certain real estate. During September 2015, this note payable was restructured to a term loan with total borrowings of \$3,900,000 requiring monthly payments of \$24,753 including interest calculated at 4.00%. During July 2017, this term loan was amended to allow additional borrowings of \$2,460,000 and requiring new monthly payments of \$33,363 including interest calculated at 4.25%. Total outstanding amounts plus accrued and unpaid interest are due on October 27, 2022. The agreement is secured by a deed of trust and a negative pledge of the Organization's assets. Amounts outstanding under this note totaled \$5,537,961 and \$5,695,962 at June 30, 2021 and 2020, respectively. Additionally, the agreement contains restrictive covenants that are tested annually on June 30. At June 30, 2021, management believes the Organization was in compliance with the other covenants.

During June 2020, the Organization entered into a loan agreement with CSGF Tennessee, LLC. In July 2020, under terms of the loan, the Organization received \$300,000 to be used for general support and management of the Organization. This note bears no interest. Amounts outstanding under the agreement totaled \$300,000 at June 30, 2021. Total outstanding amounts are due on November 30, 2021.

Future principal payments on the notes are as follows at June 30, 2021:

#### Years Ending June 30,

2022	\$ 464,947
2023	5,373,014
	<u>\$ 5,837,961</u>

### Note 6—Line of credit

The Organization's line of credit has a \$1,000,000 maximum availability and requires interest-only payments in monthly installments at the bank's prime rate with minimum rate of 4.5% until maturity in April 2023 at which time all outstanding principal and interest will be due. There was no balance outstanding on the line of credit as of June 30, 2021 or 2020.

### Note 7—Federal grants

The Organization receives federal pass-through funding from various grantor agencies to help meet objectives and accomplish its mission as a charter school. Total federal awards received during the years ended June 30 2021 and 2020 totaled \$4,885,320 and \$2,886,114, respectively.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

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### Note 8—Concentrations

For the years ended June 30, 2021 and 2020, the Organization received \$36,537,917 (85%) and \$29,190,456 (86%), respectively, of its funding for operations from MNPS based on the state of Tennessee's Basic Education Program ("BEP"). BEP funding is designated to schools based on student enrollment.

### Note 9—Retirement plans

#### Teacher Legacy Pension Plan of TCRS

*Plan Description* – The Tennessee Consolidated Retirement System ("TCRS") was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies ("LEA") after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

*Benefits Provided* – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with five years of service credit or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments ("COLA") after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the consumer price index ("CPI") during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest.

*Contributions* – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions for the Teacher Legacy Pension Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2021 and 2020, to the Teacher Legacy Pension Plan were \$227,037 and \$213,306, respectively, which 10.63% and 9.60% of covered payroll, respectively. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

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### Note 9—Retirement plans (continued)

#### **Teacher Retirement Plan of TCRS**

*Plan Description* – The TCRS was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with memberships in TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by LEAs after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

*Benefits Provided* – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with five years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic COLAs after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the CPI during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

*Contributions* – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer-contribution rate cannot be less than 4%, except for in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions for the Teacher Retirement Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the years ended June 30, 2021 and 2020, to the Teacher Retirement were \$139,522 and \$114,333, respectively, which is 2.03% of covered payroll for both years. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Members of the Teacher Retirement Plan are also included in a 401(k) component whereby employer contributions are made at 5% of covered payroll.



**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS**

*JUNE 30, 2021 AND 2020*

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**Note 9—Retirement plans (continued)**

**Other Plan**

The Organization's noncertified employees are covered under a 403(b) plan. Under terms of the plan, employee contributions are matched 200% up to a maximum match of 6% of eligible compensation by the Organization.

Employer contributions for all retirement plans totaled \$1,007,316 and \$1,116,608 for the years ended June 30, 2021 and 2020, respectively.

**Note 10—Commitments and contingencies**

During 2020, an outbreak of a novel strain on coronavirus ("COVID-19") emerged globally. As a result of the spread of COVID-19, economic uncertainties have arisen that could negatively impact the Organization's revenue and operations for an indeterminable time period. Other financial impacts could occur that are unknown at this time.

**LEAD PUBLIC SCHOOLS, INC.  
AND AFFILIATES**

**CONSOLIDATED FINANCIAL STATEMENTS  
AND SUPPLEMENTAL INFORMATION**

*As of and for the Year Ended June 30, 2019*

*And Report of Independent Auditor*

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

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## Report of Independent Auditor

To the Board of Directors  
LEAD Public Schools, Inc. and Affiliates  
Nashville, Tennessee

### **Report on the Consolidated Financial Statements**

We have audited the accompanying consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statement of financial position as of June 30, 2019, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to consolidated financial statements.

### ***Management's Responsibility for the Consolidated Financial Statements***

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

### ***Auditor's Responsibility***

Our responsibility is to express an opinion on these consolidated financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Opinion***

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of LEAD Public Schools, Inc. and Affiliates as of June 30, 2019, and the changes in their net assets and their cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

## **Other Matters**

### *Other Information*

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and it is not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.

### **Other Reporting Required by Government Auditing Standards**

In accordance with *Government Auditing Standards*, we have also issued our report dated December 9, 2019, on our consideration of LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting and compliance.

### **Adoption of New Accounting Pronouncement**

As discussed in Note 1 to the consolidated financial statements, LEAD Public Schools, Inc. and Affiliates adopted Accounting Standards Update 2016-14, *Not-for-Profit Entities* (Topic 958): *Presentation of Financial Statements of Not-for-Profit Entities*. Our opinion is not modified with respect to this matter.

A handwritten signature in blue ink that reads "Cherry Bebaert LLP". The signature is written in a cursive, flowing style.

Nashville, Tennessee  
December 9, 2019

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF FINANCIAL POSITION**

*JUNE 30, 2019*

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**ASSETS**

Current Assets:

Cash and cash equivalents	\$ 5,377,123
Accounts receivable	1,537,316
Prepaid expenses and other	<u>460,062</u>
Total Current Assets	7,374,501

Property and equipment, net	7,578,171
Construction in progress	<u>330,000</u>
<b>Total Assets</b>	<u><u>\$ 15,282,672</u></u>

**LIABILITIES AND NET ASSETS**

Current Liabilities:

Accounts payable	\$ 362,035
Accrued expenses	1,674,869
Other current liabilities	127,304
Notes payable, current portion	<u>150,693</u>
Total Current Liabilities	2,314,901

Notes payable, noncurrent portion	<u>5,707,885</u>
Total Liabilities	8,022,786

Net Assets:

Without donor restriction	6,859,886
With donor restriction	<u>400,000</u>
Total Net Assets	<u>7,259,886</u>
<b>Total Liabilities and Net Assets</b>	<u><u>\$ 15,282,672</u></u>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**

*YEAR ENDED JUNE 30, 2019*

	<b>Without Donor Restriction</b>	<b>With Donor Restriction</b>	<b>Total</b>
<b>Public Support and Revenue:</b>			
District funding	\$ 27,216,687	\$ -	\$ 27,216,687
Federal grants	2,990,447	-	2,990,447
Contributions and other	1,062,921	400,000	1,462,921
Net assets released from restrictions	-	-	-
Total Public Support and Revenue	<u>31,270,055</u>	<u>400,000</u>	<u>31,670,055</u>
<b>Expenses:</b>			
Student instruction and services	27,901,797	-	27,901,797
Administration	2,811,576	-	2,811,576
Fundraising	192,472	-	192,472
Total Expenses	<u>30,905,845</u>	<u>-</u>	<u>30,905,845</u>
Change in net assets	364,210	400,000	764,210
Net assets, beginning of year	<u>6,495,676</u>	<u>-</u>	<u>6,495,676</u>
Net assets, end of year	<u><u>\$ 6,859,886</u></u>	<u><u>\$ 400,000</u></u>	<u><u>\$ 7,259,886</u></u>

The accompanying notes to the consolidated financial statements are an integral part of this statement.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES**

YEAR ENDED JUNE 30, 2019

	<b>Student Instruction and Services</b>	<b>Supporting Services</b>		<b>Total Expenses</b>
		<b>Administration</b>	<b>Fundraising</b>	
Salaries, wages, and benefits	\$ 18,179,598	\$ 1,291,171	\$ 117,232	\$ 19,588,001
Transportation	2,698,364	12,441	51	2,710,856
Occupancy	2,574,475	79,667	-	2,654,142
Professional and service fees	1,044,770	578,277	18,040	1,641,087
Depreciation	1,005,652	120,507	-	1,126,159
Instructional	789,408	156,974	2,228	948,610
Office expense	695,301	24,341	560	720,202
Organizational development	173,073	148,708	8,114	329,895
Authorizer fees	-	320,247	-	320,247
Athletics	281,650	-	-	281,650
Interest	255,193	-	-	255,193
Other expenses	158,897	71,228	991	231,116
Outreach	45,416	8,015	-	53,431
Development expense	-	-	45,256	45,256
<b>Total Expenses</b>	<b>\$ 27,901,797</b>	<b>\$ 2,811,576</b>	<b>\$ 192,472</b>	<b>\$ 30,905,845</b>

The accompanying notes to the consolidated financial statements are an integral part of this statement.



**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**CONSOLIDATED STATEMENT OF CASH FLOWS**

*YEAR ENDED JUNE 30, 2019*

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<b>Cash flows from operating activities:</b>	
Change in net assets	\$ 764,210
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation and amortization	1,126,159
Changes in operating assets and liabilities:	
Accounts receivable	591,840
Prepaid expenses and other	(166,846)
Accounts payable	162,055
Accrued expenses	621,051
Other liabilities	<u>127,304</u>
Net cash provided by operating activities	<u>3,225,773</u>
<b>Cash flows from investing activities:</b>	
Purchase of property and equipment	<u>(964,674)</u>
Net cash used in investing activities	<u>(964,674)</u>
<b>Cash flows from financing activities:</b>	
Proceeds from notes payable	38,480
Payments on note payable	<u>(371,563)</u>
Net cash used in financing activities	<u>(333,083)</u>
Net increase in cash and cash equivalents	1,928,016
Cash and cash equivalents at beginning of year	<u>3,449,107</u>
Cash and cash equivalents at end of year	<u><u>\$ 5,377,123</u></u>
<b>Supplemental disclosure of cash flow information:</b>	
Cash paid during the year for interest	<u><u>\$ 255,193</u></u>

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

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### **Note 1—Nature of operations and summary of significant accounting policies**

LEAD Public Schools, Inc. (“LPS”) was incorporated during 2010 as a charter management organization that starts and operates public charter schools in Middle Tennessee. Public charter schools in Tennessee are public schools operated under a charter contract with a local district, statewide district, or the state board of education and governed under a nonprofit board of directors separate from the district. Currently, LPS operates five charter schools as single member limited liability corporations consisting of LEAD Academy, Nonprofit, LLC (the “Academy”); Cameron College Prep, Nonprofit, LLC (“Cameron”); Brick Church College Prep, Nonprofit, LLC (“Brick Church”); LEAD Prep Southeast, Nonprofit, LLC (“Southeast”); and Neely’s Bend College Prep, Nonprofit, LLC (“Neely’s Bend”). In addition, LPS operates a real estate holding company, LEAD Real Estate Holdings, Nonprofit, LLC (“LEAD Real Estate”).

The Academy, Cameron, Brick Church, Southeast, and Neely’s Bend were organized in accordance with Section 6(1)(a) of the Tennessee Public Charter School Act of 2002 (the “Act”). Pursuant to the Act, public charter schools are part of the state’s public education program offering an alternative means within the public school system for accomplishing necessary outcomes of education. The Academy entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on July 23, 2006, to operate a charter school in Nashville, Tennessee. The Academy began classes in July 2007 with fifth and sixth grade classes. The Academy has since added a grade each year until it reached twelfth grade. Cameron entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 1, 2010, to operate a charter school in Nashville, Tennessee. Cameron began classes in August 2011 with fifth grade and has since added a grade each year through the eighth grade. Brick Church entered into a Charter School Agreement with the Tennessee Achievement School District (“ASD”) on June 1, 2012, to operate a charter school in Nashville, Tennessee. Brick Church began classes in August 2012 with fifth grade and has since added a grade each year through the eighth grade. Southeast entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 25, 2011, to operate a charter school in Nashville, Tennessee. Southeast began classes in August 2013 with fifth grade and plans to add a grade each subsequent year through the twelfth grade. Neely’s Bend entered into a Charter School Agreement with the Tennessee Achievement School District on May 21, 2015, to operate a charter school in Madison, Tennessee. Neely’s Bend began classes in August 2015 with fifth grade and has since added a grade each year through the eighth grade.

In accordance with the Academy’s, Cameron’s, and Southeast’s charter agreements, enrollment is open to any student within the Metropolitan Nashville Public Schools (“MNPS”) System who resides in Davidson County. Brick Church and Neely’s Bend enrollment is restricted to students who would have been zoned to Brick Church Middle School, Neely’s Bend Middle School, respectively, or other ASD Priority School. If space exists after planned enrollment of zoned students, other eligible students may enroll or be included in an enrollment lottery pursuant to T.C.A. Section 49-13-106. The Academy currently enrolls students in grades nine through twelve. The Academy’s charter provides for a total enrollment of 800. Cameron currently enrolls students in grades five through eight. Brick Church currently enrolls students in grades five through eight. Southeast currently enrolls students in grades five through ten. Neely’s Bend currently enrolls students in grades five through eight.

*Basis of Presentation* – The accompanying consolidated financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America (“U.S. GAAP”). The consolidated financial statements present the financial position and results of operations of LPS, the Academy, Cameron, Brick Church, Southeast, Neely’s Bend, and LEAD Real Estate (collectively the “Organization”).

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

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### Note 1—Nature of operations and summary of significant accounting policies (continued)

The Organization presents its consolidated financial statements in accordance with Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”) guidance for not-for-profit organizations. Under this guidance, net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

*Net Assets Without Donor Restriction* – Net assets that are not subject to donor-imposed stipulations. All contributions are considered available for general use unless specifically restricted by the donor.

*Net Assets With Donor Restriction* – Net assets subject to donor-imposed stipulations that may or will be met, either by actions of the Organization and/or the passage of time. When a restriction expires, net assets with donor restriction are reclassified to net assets without donor restriction and reported in the statements of activities as net assets released from restriction. If a restriction is fulfilled in the same time period in which the contribution is received, the support is reported as increases to net assets without donor restriction. Additionally, some net assets are subject to a donor-imposed stipulation that they be held in perpetuity by the Organization. There were no net assets that were required to be held in perpetuity at June 30, 2019.

*Use of Estimates* – The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses and allocation of functional expenses during the reporting period. Actual results could differ from those estimates.

*Cash and Cash Equivalents* – For purposes of the consolidated statement of cash flows, the Organization considers all highly liquid investments with original maturities when purchased of less than three months to be cash equivalents. The cash accounts are held primarily by financial institutions and at times may exceed amounts that are federally insured.

*Accounts Receivable* – Accounts receivable represent amounts due from grants or other sources which have been approved but not received. All receivables are reported at estimated collectible amounts.

*Property and Equipment* – Property and equipment are recorded at acquisition cost less accumulated depreciation, if purchased, or the fair value on the date received, if donated. The cost of routine maintenance and repairs is expensed as incurred. Expenditures which materially extend the economic lives, change capacities, or improve the efficiency of the related assets are capitalized. Upon sale or retirement, the cost and related accumulated depreciation are removed from the respective accounts, and the resulting gain or loss, if any, is included in the consolidated statement of activities. Depreciation is provided using the straight-line method over the estimated useful lives of the assets, ranging from three to seven years, or over the term of the lease for leasehold improvements, if less.

*Donated Materials, Services, and Assets* – Donated materials and services, if any, are reflected as contributions in the accompanying consolidated financial statements at their estimated values at the date of receipt. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation, and are recorded at their fair values in the period received.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

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### **Note 1—Nature of operations and summary of significant accounting policies (continued)**

Donations of property and equipment are recorded as support at their estimated fair value. Such donations are reported as net assets without donor restriction unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restriction. Absent donor stipulations regarding how long those donated assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Organization reclassifies net assets with donor restriction to net assets without donor restriction at that time.

*Grants* – The Organization receives federal financial assistance through state agencies. The expenditure of funds received under these programs generally requires compliance with terms and conditions specified in the grant agreements and are subject to audit by the grantor agencies.

*Functional Allocation of Expenses* – The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. While most costs have been directly assigned to a functional category, certain joint costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis. Expenses that are allocated consist primarily of salaries and wages which are allocated based on time and effort.

*Income Taxes* – The Organization is exempt from federal income taxes under the provisions of Internal Revenue Code Section 501(c)(3), and, accordingly, no provision for income taxes is included in the consolidated financial statements.

The Organization follows FASB ASC guidance clarifying the accounting for uncertainty in income taxes recognized in an entity's financial statements. This guidance prescribes a minimum probability threshold that a tax position must meet before a financial statement benefit is recognized. The minimum threshold is defined as a tax position that is more likely than not to be sustained upon examination by the applicable taxing authority, including resolution of any related appeals or litigation processes, based on the technical merits of the position. The tax benefit to be recognized is measured as the largest amount of benefit that is greater than 50% likely of being realized upon ultimate settlement. The Organization has no tax penalties or interest reported in the accompanying consolidated financial statements.

*New Accounting Pronouncement* – In August 2016, the FASB issued Accounting Standards Update (“ASU”) 2016-14, *Not-for-Profit Entities* (Topic 958) – *Presentation of Financial Statements of Not-for-Profit Entities*. The Update addresses the complexity and understandability of net asset classification, deficiencies in information about liquidity and availability of resources, and the lack of consistency in the type of information provided about expenses and investment return. The ASU has been applied retrospectively to all periods presented.

*Accounting Policies for Future Pronouncements* – In May 2014, the FASB issued ASU 2014-09, *Revenue from Contracts with Customers*. ASU 2014-09 clarifies the principles for recognizing revenue and develops a common revenue standard under U.S. GAAP under which an entity should recognize revenue to depict the transfer of promised goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services. ASU 2014-09 is effective for the Organization for the year ending June 30, 2020. The Organization is currently evaluating the effect of the implementation of this new standard.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

### Note 1—Nature of operations and summary of significant accounting policies (continued)

In February 2016, the FASB issued ASU 2016-02, *Leases*. The standard requires all leases with lease terms over 12 months to be capitalized as a right of use asset and lease liability on the statement of financial position at the date of lease commencement. Leases will be classified as either finance or operating. This distinction will be relevant for the pattern of expense recognition in the statement of activities. This standard will be effective for the year ending June 30, 2022. The Organization is currently evaluating the effect of the implementation of this new standard.

In August 2016, the FASB issued ASU 2016-15, *Classification of Certain Cash Receipts and Cash Payments*. This guidance adds or clarifies guidance on the classification of certain cash receipts and payments in the statements of cash flows. This guidance is effective for the year ending June 30, 2020. The Organization is currently evaluating the effect of the implementation of this new standard.

In June 2018, the FASB issued ASU 2018-08, *Not-for-Profit Entities Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made*. The standard provides guidance on determining whether a transaction should be accounted for as a contribution or as an exchange transaction. A primary aspect of this determination is whether the two parties receive and sacrifice commensurate value. The standard also provides guidance on determining whether a contribution is conditional, helping entities better distinguish a donor-imposed condition from a donor-imposed restriction. The standard will be effective for the fiscal year ending June 30, 2020. The Organization is currently evaluating the effect of the implementation of this new standard.

*Subsequent Events* – The Organization evaluated subsequent events through December 9, 2019, when these consolidated financial statements were available to be issued.

### Note 2—Liquidity and availability of resources

The Organization regularly monitors liquidity required to meet its operating needs and other contractual commitments. For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Organization considers all expenditures related to its ongoing program service activities as well as the conduct of services undertaken to support those activities to be general expenditures. The Organization maintains a line of credit with maximum borrowings of \$1,000,000 (see Note 6) with a financial institution that is drawn upon during the year to manage cash flow, if needed. Financial assets available for general expenditure, that is, without donor restriction or other restrictions limiting their use within one year of the statement of financial position, comprise the following at June 30, 2019:

Financial assets:

Cash and cash equivalents	\$ 5,377,123
Accounts receivable	1,537,316
Total financial assets	<u>6,914,439</u>

Less amounts not available to be used for general expenditures within one year

	<u>(400,000)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 6,514,439</u>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO CONSOLIDATED FINANCIAL STATEMENTS**

JUNE 30, 2019

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**Note 3—Property and equipment**

Property and equipment consists of the following at June 30, 2019:

Land	\$	542,960
Buildings and improvements		7,319,420
Computer equipment		1,915,783
Furniture and fixtures		398,150
Office equipment		140,283
Textbooks		166,177
Leasehold improvements		1,049,127
School buses		426,284
		<u>11,958,184</u>
Less accumulated depreciation		<u>(4,380,013)</u>
	\$	<u>7,578,171</u>

Depreciation expense totaled \$1,126,159 for the year ended June 30, 2019.

Construction in progress totaling \$330,000 at June 30, 2019 consisted of buildout costs incurred for a new physical education facility at the Organization's Metroplex property.

**Note 4—Operating leases**

During 2014, Cameron entered into a lease arrangement with MNPS for certain educational facilities starting July 1, 2014 and expires June 30, 2021. The lease requires monthly rent payments of \$31,417 subject to annual increases of 2%. Effective July 1, 2015, this lease was amended permitting the Academy's ninth grade to use a portion of Cameron's leased space. The amendment required monthly rental payments of \$25,957 from Cameron and \$10,347 from the Academy subject to annual increases of 2%. The amendment also gave the Organization the right to terminate the lease subject to 60 days' written notice. Effective July 1, 2017, the lease was amended permitting the Academy's tenth through twelfth grades to use a portion of Cameron's leased space. The amendment requires monthly rental payments of \$21,982 from Cameron and \$23,371 from the Academy subject to annual increases of 2%. Effective July 1, 2018, the lease was amended reducing the monthly rental payment to \$21,468 subject to annual increases of 2%. Under the terms of the lease, rent expense totaled \$257,616 for the year ended June 30, 2019.

As of June 30, 2019, future minimum operating lease payments required are as follows:

<u>Years Ending June 30,</u>		
2020	\$	262,768
2021		<u>268,023</u>
	\$	<u>530,791</u>

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

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### Note 5—Notes payable

During November 2013, the Organization entered into a loan agreement with CSGF Tennessee, LLC. Under terms of the loan, the Organization received \$100,000 to be used for general support and management of the Organization. The note bears interest at 1.00%. The loan was paid in full during the year ended June 30, 2019.

During July 2015, the Organization entered into a second loan agreement with CSGF Tennessee, LLC. Under terms of the loan, the Organization received \$100,000 to be used for general support and management of the Organization. The note bears interest at 1.00%. The loan was paid in full during the year ended June 30, 2019.

In February 2014, the Organization entered into a note payable with a financial institution for the purchase of certain real estate. During September 2015, this note payable was restructured to a term loan with total borrowings of \$3,900,000 requiring monthly payments of \$24,753 including interest calculated at 4.00%. During July 2017, this term loan was amended to allow additional borrowings of \$2,460,000 and requiring new monthly payments of \$33,363 including interest calculated at 4.25%. Total outstanding amounts plus accrued and unpaid interest are due on July 27, 2022. The agreement is secured by a deed of trust and a negative pledge of the Organization's assets. Amount outstanding under this note totaled \$5,991,661 at June 30, 2019. Additionally, the agreement contains restrictive covenants that are tested annually on June 30. At June 30, 2018, the Organization was in compliance with the other covenants.

Future principal payments on the notes are as follows at June 30, 2019:

#### Years Ending June 30,

2020	\$150,693
2021	158,002
2022	164,947
2023	5,384,936
	<u>\$ 5,858,578</u>

### Note 6—Line of credit

The Organization maintains a line of credit agreement with a financial institution to provide maximum borrowings of \$1,000,000. The line of credit requires monthly interest payments calculated at the bank's prime rate not to fall below 4.5% and matures in April 2020. There were no outstanding amounts under this line of credit as of June 30, 2019.

### Note 7—Federal grants

The Organization receives federal pass-through funding from various grantor agencies to help meet objectives and accomplish its mission as a charter school operator. Total federal awards received during the year ended June 30, 2019 totaled \$2,990,447.

### Note 8—Concentrations

For the year ended June 30, 2019, the Organization received \$26,966,899 (85%) of its funding for operations from MNPS based on the State of Tennessee's Basic Education Program ("BEP"). BEP funding is designated to schools based on student enrollment.

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

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### Note 9—Retirement plans

#### Teacher Legacy Pension Plan of TCRS

*Plan Description* – The Tennessee Consolidated Retirement System (“TCRS”) was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publically available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost sharing multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies (“LEAs”) after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

*Benefits Provided* – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with five years of service credit or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member’s highest five consecutive year average compensation and the member’s years of service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service related disability benefits are provided regardless of length of service. Five years of service is required for non-service related disability eligibility. The service related and non-service related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments (“COLA”) after retirement. A COLA is granted each July for annuitants retired prior to the 2nd of July of the previous year. The COLA is based on the change in the consumer price index (“CPI”) during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Legacy Pension Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis.

*Contributions* – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5% of salary. The LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions for the Teacher Legacy Pension Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2019 to the Teacher Legacy Pension Plan were \$278,518 which is 9.33% of covered payroll. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.



# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

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### Note 9—Retirement plans (continued)

#### Teacher Retirement Plan of TCRS

*Plan Description* – The TCRS was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publically available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by LEAD: MNPS with memberships in TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost sharing multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies (LEAs) after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

*Benefits Provided* – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with five years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service related disability benefits are provided regardless of length of service. Five years of service is required for non-service related disability eligibility. The service related and non-service related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic COLAs after retirement. A COLA is granted each July for annuitants retired prior to the 2nd of July of the previous year. The COLA is based on the change in the CPI during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

*Contributions* – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5% of salary. The LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer contribution rate cannot be less than 4%, except for in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions for the Teacher Retirement Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2019 to the Teacher Retirement Plan were \$184,090 which is 4% of covered payroll. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Members of the Teacher Retirement Plan are also included in a 401(k) component whereby employer contributions are made at 5% of covered payroll.

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO CONSOLIDATED FINANCIAL STATEMENTS**

*JUNE 30, 2019*

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**Note 9—Retirement plans (continued)**

**Other Plan**

The Organization's noncertified employees are covered under a 403(b) plan. Under terms of the plan, employee contributions are matched 200% up to a maximum match of 6% of eligible compensation by the Organization. Employer contributions to this plan totaled \$140,028 for the year ended June 30, 2019.

Employer contributions for all retirement plans totaled \$986,796 for the year ended June 30, 2019.

## **SUPPLEMENTAL INFORMATION**

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS**

JUNE 30, 2019

<u>Federal Grantor / Program Title</u>	<u>Federal CFDA Number</u>	<u>Pass-Through Entity Identifying Number</u>	<u>Federal Expenditures</u>
U.S. Department of Education - Office of Elementary and Secondary Education:			
Title I Grants to Local Educational Agencies:			
(Passed through Metro Nashville Public Schools)	84.010	N/A	\$ 653,379
(Passed through State of Tennessee Department of Education)	84.010	N/A	<u>1,130,678</u>
Total Title I Grants to Local Educational Agencies			<u>1,784,057</u>
Supporting Effective Instruction State Grants:			
(Passed through Metro Nashville Public Schools)	84.367	N/A	61,700
(Passed through State of Tennessee Department of Education)	84.367	N/A	<u>44,739</u>
Total Supporting Effective Instruction State Grants			<u>106,439</u>
Higher Education Institutional Aid:			
(Passed through Metro Nashville Public Schools)	84.031A	N/A	<u>51,750</u>
Grants for Replication and Expansion of High-Quality Charter Schools			
(Passed through Metro Nashville Public Schools)	84.282M	N/A	360,544
(Passed through State of Tennessee Department of Education)	84.282M	N/A	<u>112,018</u>
Total Grants for Replication and Expansion of High-Quality Charter Schools			<u>472,562</u>
School Safety National Activities			
(Passed through State of Tennessee Department of Education)	84.184Y	N/A	<u>34,770</u>
<u>Special Education Cluster (IDEA):</u>			
Special Education Grants to States:			
(Passed through Metro Nashville Public Schools)	84.027	N/A	325,349
(Passed through State of Tennessee Department of Education)	84.027	N/A	<u>215,520</u>
Total Special Education Grants to States			<u>540,869</u>
Total for Special Education Cluster			<u>540,869</u>
Total U.S. Department of Education - Office of Elementary and Secondary Education			<u>2,990,447</u>
Total Expenditures of Federal Awards			<u>\$ 2,990,447</u>

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS**

*JUNE 30, 2019*

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**Note 1—Basis of presentation**

The accompanying schedule of expenditures of federal awards (the “Schedule”) includes the federal award activity of LEAD Public Schools, Inc. and Affiliates under programs of the federal government for the year ended June 30, 2019. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (“Uniform Guidance”). Because the Schedule presents only a selected portion of the operations of LEAD Public Schools, Inc. and Affiliates, it is not intended to and does not present the financial position, changes in net assets, or cash flows of LEAD Public Schools, Inc. and Affiliates.

**Note 2—Summary of significant accounting policies**

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following, as applicable, either the cost principle in OMB Circular A-122, *Cost Principles for Non-Profit Organization*, or the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

**Note 3—Indirect cost allocation**

LEAD Public Schools, Inc. and Affiliates has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance.

**Report of Independent Auditor on Internal Control over Financial Reporting and on  
Compliance and Other Matters Based on an Audit of Financial Statements Performed  
in Accordance with *Government Auditing Standards***

To the Board of Directors  
LEAD Public Schools, Inc. and Affiliates  
Nashville, Tennessee

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statement of financial position as of June 30, 2019, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the consolidated financial statements, and have issued our report thereon dated December 9, 2019.

### **Internal Control over Financial Reporting**

In planning and performing our audit of the consolidated financial statements, we considered LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting ("internal control") to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control. Accordingly, we do not express an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

### **Compliance and Other Matters**

As part of obtaining reasonable assurance about whether LEAD Public Schools, Inc. and Affiliates' consolidated financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

**Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control or on compliance. The report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliates' internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

A handwritten signature in blue ink that reads "Cherry Bekaert LLP". The signature is written in a cursive, flowing style.

Nashville, Tennessee  
December 9, 2019

**Report of Independent Auditor on Compliance for Each Major Program  
and on Internal Control over Compliance Required by the Uniform Guidance**

To the Board of Directors  
LEAD Public Schools, Inc. and Affiliates  
Nashville, Tennessee

**Report on Compliance for Each Major Federal Program**

We have audited LEAD Public Schools, Inc. and Affiliates' compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of LEAD Public Schools, Inc. and Affiliates' major federal programs for the year ended June 30, 2019. LEAD Public Schools, Inc. and Affiliates' major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

***Management's Responsibility***

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

***Auditor's Responsibility***

Our responsibility is to express an opinion on compliance for each of LEAD Public Schools, Inc. and Affiliates' major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about LEAD Public Schools, Inc. and Affiliates' compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of LEAD Public Schools, Inc. and Affiliates' compliance.

***Opinion on Each Major Federal Program***

In our opinion, LEAD Public Schools, Inc. and Affiliates complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2019.



## Report on Internal Control over Compliance

Management of LEAD Public Schools, Inc. and Affiliates is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered LEAD Public Schools, Inc. and Affiliates' internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control over compliance.

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

A handwritten signature in blue ink that reads "Cherry Bebaert LLP". The signature is written in a cursive, flowing style.

Nashville, Tennessee  
December 9, 2019

# LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

## SCHEDULE OF FINDINGS AND QUESTIONED COSTS

YEAR ENDED JUNE 30, 2019

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### I. Summary of Auditor's Results

1. The auditor's report expresses an unmodified opinion on whether the consolidated financial statements of LEAD Public Schools, Inc. and Affiliates were prepared in accordance with U.S. GAAP.
2. No significant deficiencies relating to the audit of the financial statements are reported in the Report of Independent Auditor on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*.
3. No instances of noncompliance material to the consolidated financial statements of LEAD Public Schools, Inc. and Affiliates were disclosed during the audit.
4. No significant deficiencies relating to the audit of major federal award programs are reported in the Report of Independent Auditor on Compliance for Each Major Program and on Internal Control over Compliance Required by the Uniform Guidance.
5. The auditor's report on compliance for LEAD Public Schools, Inc. and Affiliates major program listed below expresses an unmodified opinion.
6. Audit findings that are required to be reported in accordance with 3 CFR Section 200.516(a) are reported in this Schedule.
7. The program tested as major program was:

CFDA Number  
84.010

Name of Federal Program or Cluster  
Title I Grants to Local Educational Agencies

8. The threshold for distinguishing Types A and B programs was \$750,000.
9. LEAD Public Schools, Inc. and Affiliates was determined to be a low-risk auditee.

### II. Findings – Financial Statement Audit

None

### III. Findings and Questioned Costs – Major Federal Award Programs Audit

None

**LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES**  
**SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS**

*YEAR ENDED JUNE 30, 2019*

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None

P. Original approved charter application

## **PROPOSAL NARRATIVE**

**Please respond to the following Applicant Questions, limiting your narrative response to all sections to 75 pages total, plus attachments. This means that the length of this document, including these instructions and the questions below, may be no longer than 105 pages. Attachments are not included in the page limit.**

**Please add the full name of your school to the footer of this document so that it appears on all pages.**

**Your responses must be typed with 1-inch page margins and 12-point font, single-spaced. Use the boxes provided to type your responses.**

**Each major section (Executive Summary, Founding Group, etc.) must begin on a separate page.**

**If a particular question does not apply to your team or proposal, simply respond “Not Applicable,” and briefly explain why the question is not applicable to your team or proposal.**

**When you have completed your response and verified that the total length of the document does not exceed 105 pages, please save this document as a PDF file. Name your file according to this convention: NAME OF OPERATOR.Proposal Narrative.pdf. Upload your PDF file to the online application submission portal.**

Detailed scope and sequences for current grades are available upon request.

A school director job description is available upon request.

## EXECUTIVE SUMMARY

The Executive Summary should provide a concise overview of the targeted community(ies) and your community engagement to date; the school design being proposed for replication (including as a takeover design, if applicable); the replication or network growth plan; and the applicant's performance record and capacity to execute the plan successfully. The Executive Summary should address the following:

**Mission and Vision for Growth in Tennessee.** State the mission and vision of the proposed schools and network as a whole. Provide an overview of the organization's strategic vision and five-year growth plan for developing new schools in Tennessee, including: years of opening; number and types of schools (grade levels); and projected numbers of students. Briefly describe the targeted community(ies) and explain how each school would meet identified needs in the community.

**Educational Need.** Describe the educational needs and challenges of each community targeted and your rationale for choosing the community.

**Target Population.** Explain how the decision to serve the targeted population, including the grade levels you have chosen, would meet community needs. Identify any enrollment priorities you have set and explain how these will comply with applicable restrictions on enrollment procedures.

**Community Engagement.** Explain the relationships, if any, that you have already established to engage students, parents, and the community for the proposed schools. If you have assessed demand and/or solicited support for the schools, briefly describe these activities and the status of your efforts.

**Educational Plan/School Design.** Provide an overview of the education program proposed for replication, including key non-negotiables of the education model. Briefly explain the research base and performance record that demonstrate the school model will be successful in improving academic achievement for the targeted student population.

**Network Governance and Leadership.** Provide an overview of the proposed network governance and management structure and leadership team. Highlight the strengths of the proposed governing board and leadership team. Explain how the governance and management structure will provide for stable, effective governance and leadership – and ultimately mission fulfillment – for the proposed school replication plan over the long term.

TYPE YOUR EXECUTIVE SUMMARY IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

**Mission and Vision for Growth in Tennessee:** Today in Nashville, a low-income student has a 1 in 10 chance of graduating from high school prepared for a 4-year college. Over the last 4 years, more than 2,000 low-income students vanished from Nashville's schools, but they didn't vanish from our streets, our hospitals, our unemployment lines or, sadly, from our prisons and welfare rolls. This is an extraordinary injustice, and the impact of this educational inefficiency

on Middle Tennessee's cultural vitality and economic growth is staggering.

LEAD Public Schools exists to radically change the educational landscape for low-income students and communities in Nashville. Our mission, to graduate 100% of our students and send them to a 4-year college/university, is based on the belief that every student has the potential to graduate from high school, attend a 4-year college/university, and commit to adopting a "*Whatever it Takes*" attitude toward making this a reality.

LEAD Public Schools has committed itself to opening and operating at least five schools in Nashville that will ultimately serve grades 5-12 at each campus and approximately 4,700 students network-wide that will graduate up to 500 low-income students each year, with every one of these graduates accepted to a four-year college and college-ready. This means that by 2020, LEAD could double the number of low-income college-ready graduates produced each year by public schools in Nashville.

LPS is currently focused on transforming underperforming middle schools in North, East, and South Nashville, with a focus on building capacity to expand to include grades 9-12 following the successful transformation of grades 5-8. LEAD is currently employing this strategy at Cameron Middle School and is focused on partnering with the ASD and the MNPS Innovation School Zone to produce additional high performing 5-12 schools.

LEAD Public Schools is submitting this application to partner with the ASD to transform schools within the ASD's control by using the proven LEAD phase-in, conversion model. While the ASD has not yet identified the schools in need of transformation, LEAD Public Schools is excited about submitting this application to be an approved ASD operator and partner. Much like our relationship with MNPS, LPS anticipates a strong, cooperative partnership with the ASD and anticipates immediately, upon approval of this application, to begin discussions with the ASD and its staff to find the most appropriate schools and timeline for transformation. Though our financial and expansion plan presented in this application evidences LPS growing to five schools (two conversions and three fresh starts) we welcome discussions with the ASD to operate more conversions as long as we can maintain a high degree of fidelity to the LEAD model. Based on our experience with the Cameron conversion we have learned that our greatest successes so far have come from remaining flexible in our approach to working with the district and making modifications, when appropriate, to best meet the needs of all students.

**Educational Need and Target Communities:** Based on a collaborative review with MNPS of persistence, graduation, and college ready data across each high school cluster in Nashville, as well as our six years of experience working with parents, students, teachers, and community members across Nashville, it is clear there is a tremendous need for high performing schools. Our city's lowest-performing schools share a reality similar to that of most chronically underperforming schools around the country. This reality includes, enrolling a high percentage of students of poverty with high levels of learning deficits, a great range and variability in students' needs, an incredibly diverse population, and the absence of a school culture focused on high achievement and expectations. Individual and family risk factors seem to be compounded by the effects of resource-poor community environments and resource inequities, resulting in significant challenges in students' readiness to learn and the school's ability to meet these needs under the current structure. Furthermore, based on the lack of transformative change produced by state and district reform strategies, it is clear that a traditional school model and education approach have been inadequate to address the challenges facing the anticipated ASD schools.

- Four years ago, MNPS enrolled 6,200 9<sup>th</sup> graders, of which 4,000 or 65% were low-income.
- Last year the number of low-income students scoring  $\geq 21$  on the ACT was less than 400.
- Thus, the likelihood of a low income 9<sup>th</sup> grader in MNPS becoming college ready 4 years later is less than 10%.

Source: Internal analysis being conducted by LEAD Public Schools and MNPS.

Our targeted communities of South, East, and North Nashville have been experiencing growth in poverty, crime, and educational failure for decades, and produce the fewest number of low-income college ready students. Many of the lowest-performing schools serve a majority minority student population with many schools serving a student-population that has in excess of 90% qualifying for free and reduced lunch. Nashville's future economic and cultural vitality is dependent upon these communities producing a large number of college-ready high school graduates and requires a radical transformation of the 5-12 educational pipeline.

In this submission LEAD Public Schools is proposing to transform existing low performing middle schools into grade 5 - 12 charter school campuses, each producing at least 100 college ready graduates annually. Specifically, we are seeking

- an additional middle school to add to our high school in North Nashville,
- a high school to add to our middle school conversion at Cameron,
- and at least two additional middle school conversions where the middle school would be converted to an integrated 5-12 model.

**Community Engagement:** The LEAD Transformation plan lends itself easily to community organizing as LEAD has existing and well-established ties to the specific communities and neighborhoods. With our existing three schools as the organizing focus, the process of bringing together parents, students, local community leaders, teachers, administration, and school staff at the transformation schools can be a collaborative process. LEAD's community organizing efforts include two phases: first, gathering support for the transformation project itself; and second, working with stakeholders to create buy-in for the new LEAD Public School. In the first case, the Achievement School District may take a more active role in leading the organizing process, with additional emphasis placed on outreach to existing teachers at the school to be transformed. In the second, the LEAD Public School leadership team (School Director, key staff, parents, and students) will lead with the goal of creating a lasting feedback mechanism through which every individual school will become more tailored to its specific neighborhood. In both cases, open houses, forums, structured meetings, petition drives, and thorough outreach efforts are the key tools for success.

Over time, LEAD has started to transform the educational expectations of the communities it serves, creating a model for excellence in urban education and neighborhood redevelopment. Our success is the direct result of our strategy for change, which combines both the direct efforts of LEAD and the efforts of others. Our approach to partnering with other organizations has been to focus on our strength, offering a rigorous education, while coordinating with others to fill in other needed services. The coordination piece involves matching expectations for our students, emphasizing the school mission and vision that each student will attend college, connecting the right students with the right opportunities and challenges, holding students accountable to expectations consistently, and extensively coordinating planning and service delivery.

LEAD will continue to seek new partnership arrangements where mutual benefits exist without compromising the educational program or the quality of experience for students or

teachers. These relationships allow us to focus our work on students' academic education while ensuring that their broader education aligns with the school's mission. There are several additional categories of partnership and external support that LEAD has plans to develop:

1. **Nashville Business Community**—Build a series of relationships focused on increasing human capital and diversity in Nashville, combining financial support, volunteer opportunities, and internships and/or scholarships for LEAD students and alumni
2. **Community-based organizations**—Create community-based enthusiasm and support for LEAD schools and combine efforts to address social and cultural challenges that might inhibit student success
3. **Colleges and universities**—Expand current cooperation to increase financial support for LEAD's college-focused activities and seek opportunities to create volunteering/work-study programs with Nashville-based colleges and universities
4. **Aligned non-profit organizations** (e.g., Oasis Center, YMCA, Boys and Girls Club) — Seek ways to leverage the activities of other organizations to enhance program delivery and reduce costs.

In our four years, we have proven that we don't wait for families, the community, and potential partners to come to us. We take the initiative, promptly, to partner with the community, social service providers, police, shopkeepers, aldermen, pastors, arts and athletic organizations — everyone we can possibly convince to join in the vital work of making their children's school effective. Based on our initial community outreach efforts, there is an obvious need for increased community involvement and engagement.

Transforming chronically under-performing middle schools and building the high school grades on top of the transformation middle school presents the greatest opportunity for significant, enduring change for the students and requires an organization willing to partner with the Achievement School District, MNPS, the schools' existing staff, students, and families, and community members and potential partners to find the right solutions. The first step in our success has been to build the capacity to successfully manage Cameron's multi-year phase-in transition. To grow that capacity, LEAD Public Schools (LPS) quickly generated local support from the community, attracted local resources, and efficiently coordinated the business process of launching and operating a new school. Even before submitting this application, our team has started engaging members of each of our target areas in Nashville as well as meeting regularly with leaders at MNPS. We have reached out to parents, community leaders, elected officials, local clergymen, etc. and met them personally to listen, learn, and include their voices in our continuing outreach and school planning work. These relationships continue to grow and are a key strategy in our work to partner with the district and local community to produce a welcoming environment for what could otherwise be a divisive project.

**Educational Plan/School Design:** At LEAD Public Schools we firmly believe that every student has the potential to graduate from high school, attend a 4-year college/university, and commit to adopting a “*Whatever it Takes*” attitude toward making this a reality. Therefore, it is our vision that 100% of our students will graduate from high school and be accepted to a 4-year college/university. This high expectation is our north star for making decisions about our educational model and the culture we carefully and intentionally develop at each campus.

Based on our success with the first two LEAD Academy campuses, and now with Cameron College Prep, we believe that we have a proven educational model, effective community outreach experience, and the organizational strength to produce additional high performing



schools that consistently and effectively implement the LEAD Model.

Though each LEAD school shares a commitment to fully execute and refine the LEAD Model. We expect each school will serve a different community and may vary in unique ways. Still, all LEAD campuses are required to carefully implement the primary design elements of the LEAD Model. These elements are as follows:

1. Small school size of approximately 1,000 students in grades 5-12 committed to serving all types of students, including special education and ELL.
2. High expectation, high performance, college-focused culture
3. Integrated 5-12 academic program that supports structured interaction between middle and high school students
4. Extended school day and year
5. Saturday school and summer school
6. Annual community service requirements for students
7. Annual college trips for every grade
8. Daily student advisories (known as Crew) led by each teacher
9. Commitment to authentic instruction and assessment through Expeditionary Learning or related hands-on pedagogy
10. Commitment to support LEAD graduates through their college career

Based on our experience at Cameron College Prep, our first district/charter conversion school, we know that conversions come with some existing constraints (grades, facilities, predetermined enrollment zone, etc.) that may require modifications to our primary design elements. While we anticipate the need to make careful modifications in certain instances, it is our experience that our students achieve higher rates of success when we adhere as tightly as possible to our primary design elements.

Our student success is well documented and positions LEAD as the one of the highest performing charter schools in the state. Further, when compared to all high poverty middle schools in Tennessee, LEAD Academy Middle School shows effect sizes far above the norm and in math has the highest rates of proficient middle school students of any school in Nashville with greater than 75% poverty enrollment. 9<sup>th</sup> grade standardized End of Course scores at LEAD Academy High School are thought to be the highest scores of any public school in Nashville with the exception of the selective enrollment magnet schools. Effect sizes with our high school are similarly high and exceed state norms by a large margin.

Demographically, LEAD serves an almost identical cross section of students as any other Nashville public school, with the exception of a poverty rate above 94% compared to the district's average of 76%. Additionally, when compared to other charters LEAD Public schools has significantly more special education and ELL students, with 20% and 10% compared to the District's 11% and 14% respectively.

A key part of our plan is that all students, including those with disabilities, are fully integrated into all programs. The LEAD model provides all students with access to the general academic curriculum as well as all other educational programs and services provided for other students. Non-academic services and extracurricular activities have been designed in a manner that affords children with disabilities an equal opportunity for participation.

All students are given all of the support necessary to succeed. A special education instructor (called a "Collaborative Instructor" to facilitate collaborative learning amongst staff and students, as well as to minimize the stigmatization that often comes with student's being labeled

or pulled out for services) monitors each student's individual needs. One of the reasons for LEAD's success with students with specific learning needs is that all faculty and staff are made aware of any necessary modifications and meet regularly to plan, review, and collaborate to do "Whatever it Takes" to ensure that all students achieve success.

The most important part of our education plan is our comprehensive view of student development. Our program prepares all of our students to graduate from a four-year college, while at the same time instilling in them the values of community service and self-reliance needed to be productive, selfless adults. However, to reach our goal of sending more underserved students to 4-year colleges, our schools must offer more than the traditional education program. There must exist a foundation that better supports, trains, and educates these students—a learning community where students, parents, instructors, businesses, and nonprofits actively engage in the lives of students and contribute significantly to their development. By engaging the community and expecting the best from every instructor, parent/guardian and student, each LPS Schools trains every student to become a leader capable of making an immediate impact on our community. At each new LEAD school we will provide more than just an expectation: we provide the supports, the culture, and educational rigor necessary to provide each student an opportunity to excel.

We understand that there are no "silver bullets," and welcome the difficulty and importance of this, our chosen work. Our mission requires dedication, discipline, and desire. Our ability to create a performance-based culture that values hard work and personal responsibility is the key ingredient in our ability to institutionalize success in students more familiar with failure. The founding belief behind our first school and our proposal here is that when we engage the community, expect the best from every instructor, parent/guardian and student, and train every student to become a leader capable of making an immediate impact on our community, our students, their parents, and the community members will become catalysts for change in their lives and in the life of our city.

**Network Governance and Leadership:** LPS's network governance structure is based on our design as a Charter Management Organization. Presently, LPS operates three schools in Nashville, each with a strong on-site leadership team, and each receiving daily support from the LPS central office support team. LPS provides a complete range of back office support so that each school is able to devote maximum time and energy on students, staff, and effective instructional practices in order to meet our goals and expectations for all LEAD Schools. While this structure allows for financial and operational efficiencies, more importantly, it also enables us to maintain a consistent implementation of the LEAD Model and produce a growing number of internally developed leaders and master teachers. Supports to the schools include our own coordinated transportation services (we own our own fleet of buses), facilities management, foodservice, complete finance and accounting services, HR services, technology services, professional development, a consistent academic design, and special education support to each campus, and other areas as well. In addition, this structure provides us a mechanism to ensure a blend of consistency and innovation at each school, enables us to ensure clear and consistent expectations across the network, and provides for the development of instructional, management, and leadership pipelines that are all built from within the same LEAD culture.

The LPS management structure includes a CEO and COO Executive Team that reports to the Board of Directors, with functional Department Directors and School Directors reporting to the CEO and COO. This allows for direct oversight of each school, while also allowing the

significant autonomy that effective transformational leaders require. All school based staff report directly to their respective school directors and school directors make all site level hiring decisions. School Directors are provided extensive support from the Executive Team, the functional support departments, and clear expectations for producing agreed upon outcomes.

Continuity is one of LEAD's greatest strengths, and is derived from our success in attracting, training and supporting highly talented people. LEAD is committed to developing staff internally and also to conducting national searches for the most capable teaching and leadership talent we can find. Over 30% of our teaching staff are Teach For America Alumni or Corps Members. Our three school directors include one who has been with LEAD for 5 years, another who has more than ten years experience as principal of one of the most highly regarded independent schools in the southeast, and another who has previously been part of the startup team at three high performing urban charter schools. Our staff retention rate is extremely high, averaging nearly 90% over the last two years, and to date every board member has served at least one additional term beyond their initial commitment.

LEAD's executive team includes Jeremy Kane and Chris Reynolds, both native Tennesseans. Jeremy is the Founder and CEO of LEAD Public Schools and has experience as a high school teacher, school director, and nonprofit executive. He has degrees from Stanford, Oxford, and Vanderbilt, and is widely regarded as the leader of the charter school movement in Nashville. His commitment to Nashville's most challenged communities led to his vision for LEAD Academy, started 6 years ago, and has catalyzed the expansion of other charter operators in Nashville and across the state. Chris is the President and COO of Lead Public Schools, and began his education career teaching middle school in Louisiana as an early Teach For America corps member. Most recently, he led an urban charter high school on the west side of Chicago, where he helped develop and implement a 4 school network of charter high schools in Chicago, Detroit, and San Antonio (The Henry Ford Learning Institute) that currently serves almost 2,000 students in high poverty, urban communities. He also has experience as a CPA and CFO and has degrees from the University of Tennessee and University of Michigan.

LEAD Public Schools is a 501c3 nonprofit entity with a self-perpetuating board of directors of between 5 and 15 members. The board includes a parent of a current student, skilled and experienced business executives, an attorney, a local member of the judiciary, and educational entrepreneurs, among others. As LEAD expands to serve more students it expects the board will grow to include additional parent representatives and under state law is able to incorporate sole member nonprofit LLCs as subsidiaries for each school that it operates. This structure allows us to operate as an efficient consolidated enterprise, while also allowing for individual school boards if necessary.

Now in its fifth year operating charter schools in Nashville, LEAD Public Schools has a sound governance structure, a strong, capable staff, is led by a skilled and experienced executive team, and has both bylaws and strong internal management practices that have been developed and improved over during the growth of our first three charter campuses in Nashville. We have effective policies in place to ensure effective succession of board members and leadership staff, as well as consistent, effective oversight and support of our multiple campuses as we pursue our mission to graduate 100% of our students and send them to a 4-year college or university. Our organization is uniquely positioned to continue opening and operating high-performing charter schools in Nashville, and eventually, elsewhere in Tennessee.

WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK

## I. FOUNDING GROUP

### Founding Group Membership

1. Identify the Founding Group for the schools being proposed. Identify *only* individuals who will play a substantial ongoing role in school development, governance and/or management, and will share responsibility for any school or for the network as a whole. These may include network leadership, proposed governing board members, school leadership/management, and any essential partners who will play an important ongoing role in school or network development or operations.

Explain the Founding Group's collective qualifications for establishing high-quality schools in Tennessee and assuming stewardship of public funds, including your capacities in areas such as the following:

- School leadership, administration and governance
- Curriculum, instruction and assessment
- Financial, business and school operations management
- Performance management
- Parent and community engagement
- Facilities management

Provide, as **Attachment 1**, full resumes (including contact information) and professional bios for the individuals named. Identify members of the Founding Group who are proposed as board members, school leaders, or other key staff members of any school proposed for 2012 opening. *Please label each document with the individual's affiliation with the proposed school.*

2. Identify any organizations, agencies, or consultants that are major partners in planning and establishing the schools proposed, along with a brief description of their current and planned role and any resources they have contributed or plan to contribute to school development.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

LEAD Public Schools, Inc., a **Tennessee 501(c)(3) corporation**, will serve as the Sponsor of all schools in the LEAD network. LPS has already overseen the successful startup of LEAD Academy Middle and High Schools, is in year two of a successful transformation of Cameron Middle School into Cameron College Prep, and holds a fourth charter for a fresh-start charter school, named LEAD Prep Southeast, which is scheduled to open in 2012 with grade 5 and grow through grade 12. The LPS Network Support Team (the central office) provides the human capital for the Founding Group of all new schools.

**School leadership administration and governance:** The founding group of all new schools LPS develops are led by the executive management team, the board of directors, and existing LEAD school directors. The CEO and board of directors of LEAD Public Schools are well known within the Nashville community. Jeremy Kane, Founder and CEO, is a respected education entrepreneur who has successfully led the launch of three high-performing charter school campuses and has earned the trust and credibility of the community. Prior to launching LEAD Public Schools, he founded and served as the first school director of LEAD Academy

public charter school, led the Tennessee Charter Schools Association, taught high school English and Government/Economics, and worked for several Democratic elected officials in Washington, DC, as a Speechwriter and Communications Aide.

In collaboration with the founder and CEO, Chris Reynolds, the President/COO of LPS, supports the development of the LEAD vision, the pursuit of its mission, and leads the organization's operational, academic, and financial functions across all new and existing campuses. He is a former middle school teacher and TFA Corps Member, was a CPA early in his career, and is a successful charter school developer having previously served as the CFO and Director of Network Development for The Henry Ford Learning Institute, a four-school charter high school network serving low income urban populations in Chicago Detroit, and San Antonio. His work there included two years as the Executive Director of Power House High, a charter school on the west side of Chicago developed in partnership with a respected local community based organization.

LPS's School Directors comprise our school level leadership group and their collaboration and shared support of each other is one of LEAD's greatest assets. All of them bring a strong background of high performance to LEAD and will be involved in training new staff at each school, identifying founding staff for each new school, ensuring strong curricular alignment and academic excellence, and leading the growing professional learning community of school directors at LEAD. La Voe Mulgrew, school director of LEAD Academy High School, is a highly regarded high school principal with nearly 30 years of experience, including leading the upper school at one of the South's most respected independent schools. Mike Risen, School director of LEAD Academy Middle School has been with LEAD for five years and is an example of our leadership pipeline producing a school director with internally developed LEAD DNA. Edon Katz, school director of Cameron College Prep, is a skilled urban charter school leader who is now successfully leading his fourth charter school startup. Through his work at Cameron College Prep, Mr. Katz is refining our conversion model and will play a significant role in training and supporting the selected School Director. In the event our national search is does not produce the candidate we are seeking, Mr. Katz is capable of leading our next conversion school, and we have successors already being trained at both of our existing middle school campuses.

The Board of Directors is chaired by Doug Owen, a vice president in a local private equity firm, and is experienced in supporting the growth of entrepreneurial ventures. He is deeply committed to LEAD's mission and has an unwavering belief in the ability of all children to succeed in college, life, and citizenship. Additional board members bring experience in finance, operations, education leadership, fundraising, non-profit management, and strategic planning. Finally, our local presence, track record, and credibility in Nashville and the education reform movement are invaluable to establishing and maintaining critical relationships with the school district and local communities. Since approval of its first charter, the LEAD Board of Directors has grown strategically and has played a critical role in strengthening LEAD Public Schools' operational effectiveness and reputation within the Nashville community. The increased quality and involvement of the board has led to an incredibly successful fundraising effort over the past 3 years. Since 2006, LEAD has raised over \$2.4 million to support its development.

**Curriculum, Instruction, and Assessment:** Each school's instructional practices are overseen by their respective school directors, and are supported by a Chief Academic Officer who ensures

a consistent implementation of the LEAD Model and appropriate resources exist for staff at each school. Also, all LPS schools are staffed, beginning in year one, with a director of curriculum and instruction. LPS currently has a deep bench of directors of curriculum and instruction, which includes two former KIPP curriculum leaders, and a TFA alum who is now in her fourth year at LPS. Additional staff members, including grade level team leaders have already been identified to grow into this role for future LPS schools. LEAD also supports Special Education at each school through a central director of special education and associated clinical and other support

**Financial, business, and school operations:** LEAD Public Schools, and its growing Network Support Team (the central office), has been designed to integrate a strong performance management system and effective educational practices to drive student achievement and support school growth. The LPS Network Support Team's primary objective is to provide effective financial, business,, and school operations support, including training fundraising, and a range of functional services to the campuses, and by extension all of LEAD's students. The Network Support Team ensures effective implementation of the model not only by providing both instructional and non-instructional support services to each campus, but also by assessing campus performance against quality standards and ensuring each campus is effectively executing the core program elements of the LEAD Model.

LEAD Public Schools provides transportation, facilities management, foodservice oversight, and technology support to each school under the direction of Gary Satyshur, a skilled executive with over 25 years of operations and logistics experience at Dollar General, Pilot Oil, and 7-Eleven. Finance and accounting services will be provided via a services agreement with W Squared, Inc., one of Tennessee's most respected back-office outsourcing firms. This cost effective arrangement has been designed to enable LEAD to increase services rapidly and consistently to support planned growth.

**Performance Management:** The Network Support Team is also lead the performance management process activities of the organization. Led by the COO/President, LEAD utilizes an annual plan process for each school and functional area, which includes a regular dashboard reporting process for both schools and functional areas of the central office. The board of directors further assesses the CEO and COO regularly and uses a structured board reporting process led by committee leaders at each meeting.

**Parent and Community Engagement:** LEAD's office of External Relations provides the support for this work at al schools. For a conversion school like Cameron College Prep, LPS utilized a full-time staff member as a community outreach coordinator who is meeting with parents, community members, district staff, and corporate partners on a daily basis. This role is crucial to startup success and builds the necessary trust required in a successful conversion.

**Facilities Management:** LPS leases buildings from the district and the Catholic diocese and maintains and repairs them under the direction of Gary Satyshur, as noted above. All our leases require the landlord to maintain the building envelope and major infrastructure (roof, boilers, HVAC, for ex.).

## **Background**

1. Explain the circumstances and motivations that brought the Founding Group together to propose this school replication plan.
2. Describe the Founding Group's ties to and knowledge of the local community(ies) targeted in this replication plan, to the extent not addressed in the Executive Summary. Summarize each person's experience, qualifications and affiliations directly relevant to developing a quality charter school. Explain why he or she was chosen to participate in this founding group. Explain what role each individual will play.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

Due to our success with Cameron, we believe that we have a proven educational model and the organizational strength to implement effective learning communities at multiple sites and to insure that the culture within each school is consistent and focused on high school graduation and college-readiness for all.

We also believe that this is a once-in-a-lifetime opportunity to dramatically change the trajectory of low-income students in Nashville. Never before has there been such a convergence of commitment, human capital, conducive policy, and funding support focused on improving the educational opportunities for Nashville's low-income students. We believe our organization, being uniquely positioned to continue opening and operating high-performing public charter schools in Nashville, must commit to doing its part to increase the number of college ready low-income graduates. By doing so, we believe we can dramatically alter the future of Nashville and the state of Tennessee. This commitment has attracted many additional leaders, funders, board members, and staff to join our work and make their own commitment to doing "Whatever it Takes" to fulfill our mission and support the educational transformation underway in Nashville and across Tennessee.

LPS is the first CMO in Tennessee and whose knowledge of and ties to the community are extensive. We believe this uniquely positions us for success, particularly with respect to ASD and district conversions, which have the potential to produce community and political frustration, but when done carefully, as with Cameron, can produce lasting transformative change.

LPS is seeking a district facilities solution that allows us to provide students in a given neighborhood zone and their teachers and support staff the environment required to deliver a safe, effective, and high performing 5-12 college preparatory charter school. Below is a general list of necessary (and probably minimum) space requirements.

**Required Occupancy**

- July 1 (one month prior to launch of the school).

**Daily School Users**

- 850 – 1,000 students in grades 5 - 12
- Approx. 80 staff members (assume all will drive to work)
- Est. 85,000 sq. feet (roughly) plus a gym/cafeteria/common space
- Handicap accessibility

**Interior Layout**

- 54- 60 classrooms of approximately 900-1200 sq. ft. each, including an art production space, music room, and at least two fully outfitted science labs
- Offices for 8-12 administrative staff
- A safe, inviting reception area of at least 800 sq. ft.
- A teacher work room

- A large conference room and two small conference rooms
- Space for sick students and nurse supervision
- A secure records room
- Bathrooms for students
- Bathrooms for faculty
- Gym/Cafeteria/Common Space
- Seating for at least 250 at meal time
- An on site production kitchen with walk-in refrigeration and freezer space, dry storage, and adequate plumbing and electrical for equipment necessary to make and prepare meals for up to 1,000 individuals twice daily on site
- Access to the district WAN and a fully installed and configured wireless computing environment.

#### **Exterior Space**

- Outdoor space for student and faculty gatherings and for facilitating arrival and departure each day
- Outdoor space for athletics and recreation (at least two soccer/football fields, a playground, room for a community garden, and several outdoor basketball courts)
- Safe egress full size school buses to load and unload twice daily

#### **School Leadership and Leadership Team**

1. For any school proposed for 2012 opening, identify the Principal/Head of School candidate and explain why this individual is well qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Provide specific evidence that demonstrates the leader's capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that he/she has completed or is currently participating in. Also, provide, as **Attachment 2**, the qualifications, resume and professional bio for this individual. If no candidate is yet identified, explain your timeline, criteria, recruiting and selection process for hiring the school leader.

2. If the Principal/Head of School candidate has been identified, provide specific data that demonstrates strong evidence of the leader's ability to effectively serve the proposed target population. If the candidate is not yet identified, summarize the Board's academic and organizational performance record and provide specific data that demonstrates strong evidence of the Board's ability to effectively serve the proposed target population.

3. Who will work on a full-time or nearly full-time basis immediately after approval to lead development of any school(s) to open in 2012? How will this person be compensated?

4. Describe the responsibilities and qualifications of each school's leadership/management team (beyond the school leader). If known, identify the individuals who will fill these positions and provide, as **Attachment 3**, the qualifications, resumes and professional bios for these individuals. If these positions are not yet filled, explain your timeline, criteria, and process for recruitment and hiring.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.



LPS values high-caliber people as a source of strength. To fuel continued success, we are focused on continuing to attract, retain, and develop bright, motivated and innovative individuals. Over the past several years, our organization invested significantly in developing high quality candidates, recruiting them to our team, developing their skills as teachers and leaders, and rewarding those who perform. Our leadership development efforts will be a strong foundation for staffing future phase-in conversion schools. In addition, the human capital initiative is a significant effort by LEAD to use its ability to innovate in human resources as a competitive advantage over traditional public school systems and other charter public schools. Developed partnerships with Teach for America, New Leaders for New Schools, high-performing charter schools and CMO's around the country, and relationships with local and state universities will continue to provide a valuable human capital pipeline as LEAD Public Schools staff LEAD Prep Southeast with the most qualified, dedicated, and passionate applicants.

As the primary leader of the school, the School Director must be an extremely strong leader, capable of developing and supporting excellence in teaching, learning, and parental involvement, and possessing a deep, unwavering passion for this work. While LPS prefers to hire from within, we do not do so exclusively and anticipate our 2012-13 school to include a national search for a School Director. We will use our extensive relationships with a number of universities and other channels, including Teach for America, New Leaders for New Schools, and the CEO and President/COO's relationships with various high-performing CMO's around the country to attain the highest quality School Directors and staff. Additionally, LEAD is developing leaders within its own organization who may be considered for School Director positions. LEAD has a track-record of identifying, recruiting and hiring excellent school leaders for its schools, including most recently, Mike Risen, an internal hire and School Director of LEAD Academy Middle School, and Edon Katz, an external hire and School Director of Cameron College Prep.

We remain committed to both identifying internal candidates and also conducting national searches for school director positions. If necessary, we are prepared to utilize a current LEAD middle school director as the founding principal of our next conversion and have already identified potential successors for each of our existing campuses. Still, we anticipate executing a national search for leadership talent and our preferred timeline for identifying a school leader is January of 2012. This timeline supports our School Director training plan which includes a semester long residency in a currently operating LEAD school. ***Please see Attachment #1 for bios of our current middle school directors.***

The hiring of School Directors will follow our standard School Director hiring process. All applicants will receive a screening of their resume and cover letter and selected candidates will then be asked to begin the process with an initial interview with the CEO and COO. Next steps include additional exploratory interviews with existing LPS principals. Selected candidates will be asked to come to a LEAD school for a full day of interactions expected to include:

- Part of the day shadowing a current LPS School Director
- Delivering a model professional development presentation or teaching sample in front of other teachers
- Producing an on-demand writing sample
- Observing an actual lesson (or, if necessary, a short video of a teacher's lesson) and then debrief with the CEO or an existing school director the feedback and next steps for support they would recommend be provided to that teacher.
- Being interviewed by a panel of teachers, parents, and other staff

After this process, interview feedback will be compiled and references from past employers will be thoroughly checked. Finalist candidates will be selected and asked to return for another interview with the CEO and a panel interview that includes at least two board members and other key staff who may not have been able to participate up to this point in the process. Based on feedback from this process the CEO will select a candidate and make an employment offer. The preferred timeline for recruiting and hiring is March-December of the year preceding the opening of the school. This timeline allows the School Director to begin planning and preparing for their new role, recruiting and hiring founding teachers, and is early enough to ensure time to perform at least a one semester residency with a current LPS School Director.

Every LEAD school will have a leadership team that consists of a School Director, Dean of Instruction, Dean of Students, Grade Level Chairs, and support from appropriate functional teams at the NeST. This team will meet regularly to analyze enrollment, student progress and performance, determine effectiveness of the curriculum, improve instruction, and set future target goals and make necessary corrections to achieve targeted outcomes. We will recruit for the leadership positions from January through June and begin staff on-boarding and development in July.

All LEAD Public Schools will also benefit from support from the LPS Network Support Team, which includes leadership from a President/COO, and functional expertise led by a Chief Academic Officer, a Collaborative Learning Director (Exceptional Education) responsible for coordinating all IEP related services, a Development Director, a Director Operations, and additional support staff as the Home Office grows.

All LEAD schools' administrative and support staff will possess experience and expertise appropriate for their position as outlined in their job description. Because it is crucial that each school is integrated holistically into the nearby Nashville neighborhood(s) and diverse communities, the Office Manager, Receptionist and/or Parent Coordinator will likely be hired from within the community. If the student or community population evidences English language difficulties, additional support staff for translation will be hired. The relationship between LEAD families, the community, and office staff is an integral component of the LEAD campus culture. Based on our philosophy of school based decision-making, every LEAD School Director will have discretion over his/her staffing model as long as it remains within budget and allows for an effective implementation of the LEAD Model. The School Director will be in charge of ongoing reviews of all school level staff and have enough flexibility to make modifications to salaries if necessary.

WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK.

## II. SCHOOL DESIGN

For this section, describe the design and plan for **each school/campus** for which you are applying. If you are applying for multiple schools designed around the same model, simply state so.

### Education Program

#### Curriculum and Instructional Design

1. Provide a framework for the proposed instructional design. Explain the key curricular choices and how they reflect the needs of the school's target population and will ensure all students meet or exceed the expectations of the Tennessee Curriculum Standards aligned with the Common Core State Standards. The Tennessee Curriculum Standards are available at: <http://tennessee.gov/education/curriculum.shtml>

The description of the instructional design should include, at a minimum,

- the basic learning environment (e.g., classroom-based, independent study)
- class size and structure,
- an overview of the curriculum,
- teaching methods, and
- research-based support.

2. Present evidence of the research base and performance record demonstrating that this education program will be rigorous, engaging and effective for the anticipated student population. (You may refer to your response to Section V, "Portfolio Review & Performance Record.")

3. Specify instructional strategies that you will implement to support the education plan and why they are well-suited for your targeted student population. Describe the methods and systems that teachers will use to provide differentiated instruction to meet the needs of all students.

4. Identify any key educational features that would *differ* from your current education model. Explain why you would implement these features, any new resources they would require, and how these features would improve student achievement.

Provide an overview of the proposed curriculum. As **Attachment 4**, provide a course scope and sequence by subject for each grade level proposed. In addition, identify course outcomes and demonstrate clear alignment with the Tennessee Curriculum Standards and Common Core State Standards.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

Changing the expectations of a school more accustomed to failure than college preparation demands more than simply redesigning a class schedule and course guide. In selecting and designing our curriculum, we recognized the incredible amount of complexity involved in designing and implementing a dynamic and authentic college-preparatory curriculum that ensures success for all.

As such, we consulted experts across many fields, including psychologists, child

development experts, special education practitioners and researchers, curriculum design consultants, behavioral scientists, education consultants, current and former public, charter, and independent school superintendents, policy makers, and industry experts both here in Tennessee and nationally. The end product is a uniquely challenging curriculum that is specifically designed for our students and includes the most appropriate instructional methods and expectations to help all students succeed.

The LEAD curriculum is founded on the idea of performance—i.e. the ability to “effectively and wisely use what we know, in context and apply our knowledge and skills effectively in realistic tasks and settings” (Bloom, 1956). Based on the success of our first school, we define curriculum so as to include those **courses**, **activities**, and **experiences** that satisfy our matriculation standards, graduation requirements, responsible living goals and expectations, our mission statement, and affords our students opportunities to:

- Engage experts in the field.
- Participate in community service projects and learning expeditions.
- Intern in local businesses.
- Learn to live a healthy lifestyle.

Results to date have shown that our curriculum accomplishes the following:

1. Ensures consistency: students will change, instructor will change, the curriculum represents the one constant within the academic program;
2. Outlines what must be taught and when within the academic year; it provides a “road map” for the instructor
3. Outlines “the what;” instructors are expected to figure out “the how.” The job of the School Director and Instructional Team is to ensure “the how” is effective (accountability)
4. Introduces a tightly written sequence of instruction
5. Maintains a balance of skills AND content; the department as a team must ensure one is not being compromised at the sake of the other

Our standards-based, college-preparatory curriculum emphasizes regular formative and summative assessments as well as the frequent use of data to increase student achievement. It also incorporates pacing plans, which prepare staff and students for our internal benchmark assessments. Together, this program is designed to prepare all for successful high school graduation and, ultimately, for potential careers they find enjoyable, challenging, and stimulating.

All students, including English Language Learners and students with special needs, learn best when there is a rigorous, standards-based curriculum with higher-order thinking demands that challenge them to test their understanding of concepts through real life applications; when they know clearly the expectations and criteria they are trying to meet and can judge their own work; and when they participate actively in classroom talking about the concepts and standards. Students at a LEAD School will learn at higher levels in classrooms where teaching strategies reflect high expectations for all students. Proficiency in core subject areas will be based on grade-level and course expectations for rigorous standards. Students will apply skills and concepts learned to real world projects, service learning, and community internships that require problem solving, critical thinking and active engagement in classroom talk around the concepts and standards they are learning through project-based instruction, LEAD Public Schools will

transform the learning environment from a system of teacher-output and student-input to a self-directed learning environment in which teachers are facilitators and students are learners and doers. LEAD classrooms will engage students in developing clear understandings of criteria for high performance, how to judge and improve their own work – so that students know how good is good enough for proficient and advanced performance.

Instructional excellence will be a hallmark of all LEAD Public Schools. To ensure continued excellence, we will employ the best teachers and base instruction upon rigorous standards. In the past year, Tennessee has agreed to adopt the rigorous national American Diploma Project and college-readiness standards. When adopting the American Diploma Project standards, the State agreed that the new standards will:

1. Align standards and assessments with the knowledge and skills required beyond high school
2. Require all high school students to take challenging courses that actually prepare them for life after high school
3. Build college and work-ready measures into statewide accountability systems
4. Hold schools accountable for graduating students who are college and/or workforce ready, and hold postsecondary accountable for students' success once enrolled.

Furthermore, the new curriculum and standards are based on research that says that 21<sup>st</sup> Graduates need:

- Stronger math and science skills, but especially have mastered basic math; in addition, post-secondary school or work requires that students be able to think critically toward a focused solution
- Stronger communication skills, including both verbal skills and writing skills
- To be able to work in teams to solve real world problems to be able to think, apply, and use what they know
- To have a strong work ethic; be at work regularly and be on time

Research clearly indicates a strong correlation between the intensity of a school's curriculum and bachelor's degree completion. As such, we have searched for a curriculum that would be rigorous enough to both satisfy state standards and also support not only high school but college completion. Since the American Diploma Project standards meet our rigorous standards, are aligned with our mission of graduating 100% of our students, and designed to meet 21<sup>st</sup> century job and college readiness standards, we have adopted them almost wholesale. For an outline of the LEAD curriculum map, please see **Attachment 4: Curriculum Outline**.

In developing the content-based curriculum, LEAD has made a conscious attempt to give our students more than abstract "critical thinking skills" in order to continue learning and adapting. The "critical thinking skills" included in most curricula use only vague terms of general skills, processes, and attitudes. This vagueness places unreasonable demands on instructors and often results in years of schooling marred by repetitions and gaps. Therefore, our content-rich curriculum stresses vertical (5<sup>th</sup> - 8<sup>th</sup>) and horizontal (within classrooms at each grade level) continuity so that student knowledge grows consistently and progressively from grade to grade. Each of the core subjects are stressed, with every student in 5<sup>th</sup> - 8<sup>th</sup> grade receiving at least 140 minutes of daily instruction in Reading/Language Arts and 70 minutes in Math.

**Scope and Sequence:** Because our educational program emphasizes regular formative

assessment and the use of data to increase student achievement, our pacing plans, which prepare for our internal benchmark assessments, guide and define the scope and sequence of the curriculum taught in our schools. In addition, LEAD Public Schools offers elective courses for credit to provide students a comprehensive learning experience. Our staff has agreed on a definite core of knowledge and skill that all children will attain in each grade and instructors confer and plan with their colleagues regularly about effective ways of stimulating children to learn and integrate specific knowledge and skill. The specificity of our goals enables us to monitor students, and give focused attention when necessary. To this end, we provide parents with a detailed outline of the specific knowledge and skill goals for each grade, and we stay in constant contact with them in order to provide update on their child's progress. Attaining this specific and well-integrated knowledge and skill gives our students pleasure in learning, as well as self-respect, and it ensures they will enter the next grade level ready and eager to learn even more. We believe this philosophy will lead us towards the vision of sending all of our students to a 4-year college/university. *Please see Attachment 4 for a more detailed description of our middle and high school curricula and scope and sequence. Upon request, we are able to provide detailed scope and sequence materials for each grade we currently operate.*

**Instructional Methods:** Additionally, the faculty will use the most effective teaching methods to ensure all students learn the material. To ensure the curriculum has been well taught, students will be assessed in the form of daily work, participation, final projects, unit tests, standardized tests, interim assessments, and the *Core Habits of Leaders*.

Thoughtful instruction and preparation guarantees lessons are paced well, all students engage in productive work throughout the class period, instructors have time to confer with students, classroom management is smooth, and instructors are aware of each student's level of understanding and participation, which also allows instructors to differentiate instruction. It also ensures that "coverage" teaching never occurs wherein teachers simply work through the textbook, page by page, chapter by chapter, such that no guiding intellectual purpose or clear priorities frame the learning experience. The inputs of coverage teaching are easy to spot—a teacher standing in front of a captured audience talking from lecture notes or directly from the textbook, checking off topics and chapters, and moving on—as are the outputs—students failing to learn the required knowledge and thus unable to apply that knowledge in a real-world context.

The challenge, therefore, in developing our instructional goals and standards was to avoid simply adding innovative instructional methods and new venues. The instructional methods selected reinforce the tools and strategies students need to succeed at all levels.

At all LEAD schools, our instruction is based on results-oriented, authentic instruction where instructors utilize multiple forms of instruction—direct instruction, Socratic seminar, learning expeditions, technology-based learning and instruction, group learning, and student led workshops—to ensure that the textbook will be used as a resource not a syllabus. LEAD's approach to instruction emphasizes high achievement through active learning, character growth, high expectations, and authentic learning. Approaching instruction and learning in this fashion has been proven to create a school culture in which the curriculum is active and motivates students to go deeper, work harder, and do more than they thought they could.

Because many of our students will enter school performing below grade level and will require individualized attention, all LEAD instructors will be trained in various educational methodologies such that they can respond to the unique and particular needs of each individual student. Each of the instructional methods reflect the goal and mission of the school, and include

Socratic Method, Authentic Instruction, Direct Instruction, Expeditionary Learning, and the frequent use of technology.

- **Socratic Method:** This engaging technique of instruction will form the structural backbone of the high school curriculum, employed to extend student thinking and force students to probe the content at a much deeper level than at ordinary high schools. The Socratic Method, combined with a constructivist approach to learning that emphasizes hypothesis testing, exploration, discovery and conclusion-making, will build on the existing knowledge base our students acquire at the lower and middle school.
- **Authentic Instruction:** This method, according to research helps students, construct meaning and produce knowledge, use disciplined inquiry to construct meaning, and aim their work toward production of discourse, products, and performances that have value or meaning beyond success in school.
- **Direct Instruction:** This rigorously developed, highly-scripted method of instruction is fast-paced and provides constant interaction between students and the teacher. It will be employed with students who are struggling with the basics of math and literacy/reading to bring them up to grade level.
- **Expeditionary Learning:** This proven and effective instructional approach to teaching and learning emphasizes high achievement through academically rigorous learning experiences that engage all learners. It also embeds outdoor adventure and service to help students learn teamwork, courage, craftsmanship, perseverance, and compassion. It consists of five core practices—learning expeditions, active pedagogy, school culture and character, leadership and school improvement, and structures—all of which work in concert and support one another to promote high achievement through active learning, character growth, and teamwork. At Expeditionary Learning schools, literacy is central and reading and writing are integrated throughout the curriculum; character development and teamwork are not just emphasized, but embedded in our school structures, practices and rituals and integrated into the academic program. As students at LEAD, they can expect to spend time engaged in learning expeditions: in-depth studies of rich topics or themes such as water quality, the civil rights movement, or the industrial revolution. These learning expeditions will capture students’ interest through real-world projects, adventure and service. Instructors will collaborate to design learning expeditions that align with MNPS and Tennessee standards and to assess their own work and student work. Instructors at LEAD Public Schools will also participate in Expeditionary Learning’s robust professional development offerings to develop a stronger foundation of active instruction and learning, expanding student and faculty engagement, and creating and sustaining a demanding and supportive school culture.
- **Technology:** The frequent use and application of a variety of technological applications will support instructional methods deemed best to prepare our students for success in college. The school will not initially have the means to build an extensive on-campus library; therefore, the Internet will be a valuable resource for research. All students will learn HTML and be introduced to Google Apps so that they have the skills to publish academic work on a local server on the World Wide Web. Students will be required to use word processing, database, spreadsheet, and presentation applications as tools in their oral and written work. Both graphing calculators and software packages for data collection will be incorporated into mathematics and science instruction.

At LEAD schools, instructors are highly trained, energetic, knowledgeable in their content area, and creative in their use of instructional methods. Based on the instructional methods, a variety of tools and strategies will be introduced to help students learn. There will be integration of such tools between teachers and through all the instructional methods. On a daily basis, instructors will use one of more practices from the following categories, which describe instruction at all grade levels:

➤ **Protocols:**

- Protocols, such as Socratic seminars, learning logs, and jigsaws will be employed to ensure that all students think critically and participate fully.
- Protocols will be used to look at student work.
- Protocols will facilitate classroom meetings and crews, and model and encourage behavior that allows for productive individual and group work.

➤ **Workshops**

- The workshop format will be used to model or demonstrate a concept, skill, or strategy, to require students to practice and apply what was modeled, and to discuss and debrief what has been learned.

➤ **Mini-Lessons:**

- Sometimes instructors will introduce and explicitly teach concepts, skills, and strategies in a mini-lesson format in response to student work, misconceptions, or follow-ups.
- Mini-lessons may be taught to the whole class or small groups depending on student needs and learning expedition protocols.

➤ **Modeling:**

- Instructors at LEAD use practices, such as demonstrations, role-plays, and fishbowls to set criteria and model expectations for high quality group process, writing, reading, and problem-solving.
- They will also utilize practices, such as “think-alouds” to model comprehension strategies and skills.

➤ **Representative Thinking:**

- Anchor charts and other forms of documentation are used to synthesize and make public student understanding.
- Students represent their thinking using formats such as graphic organizers, recording forms, journals, quick-writes, and summaries of their learning.

➤ **Questioning and Following Student Thinking:**

- Instructors ask open-ended questions and pursue student thinking by asking follow-up questions.
- Instructors regularly confer with students individually and in small groups to monitor each student’s level of understanding, to identify class-wide issues, and to differentiate instruction.

➤ **Using Exemplars and Models:**

- Instructors use exemplars and models to help students understand quality, format, and group work.
- Instructors use a range of exemplars and models to generate criteria and to construct rubrics.

➤ **Multiple Drafts, Revision, and Critique:**

- Students produce multiple drafts for all products and assess each draft against



- generated criteria and rubrics to improve successive drafts.
  - Instructors develop focused questions to guide revision.
  - Students use critique protocols to receive and provide feedback and to revise their work.
  - **Reflecting and Debriefing:**
    - Instructors and students reflect on and debrief lessons and experiences to improve retention of information, generalization, and transfer of learning.
    - Instructors help students use reflection and debriefing to set goals for future learning.
- What makes these instructional practices so powerful is that they can and will be applied across all subject areas and are consistent through each instructional method.

**Pupil Performance Standards**

State your proposed pupil performance standards, consistent with the Tennessee Curriculum Standards and Common Core State Standards. In particular:

1. Provide, in **Attachment 5**, a complete set of your proposed learning standards for one grade *for each division* of the school (elementary, middle or high school), addressing the skills and knowledge each student will be expected to attain by the end of that grade. If a school will serve only one division, the exit standards provided in response to question 4 in this section will suffice. (Approved schools will be required to submit a full set of learning standards for all grades in the school before opening.)
2. If you plan to adopt or develop additional academic standards beyond state standards, explain what kinds of standards (content areas, grade levels) you intend to adopt or develop, and describe the adoption or development process that has taken place or will take place.
3. Explain your proposed school policies and standards for promoting students from one grade to the next. How and when will promotion and graduation criteria be communicated to parents and students?
4. Provide, in **Attachment 5**, your proposed exit standards for graduating students. Exit standards should clearly set forth what students in the last grade you anticipate serving will know and be able to do.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

By implementing the LEAD school model at all of schools, all staff will be data-driven, results-oriented and accountable for student progress in the classroom. The culture at the school will be one of constant reflection and improvement. As required under No Child Left Behind (“NCLB”), LEAD staff will ensure that all students have full access to the curriculum and that each subgroup in the school is making meaningful progress towards meeting all of the standards. All LEAD schools will implement all provisions of NCLB that are applicable to charter schools, including the use of effective methods and instructional strategies that are based on scientific research that strengthens the core academic program, meeting its annual goals, publicly reporting the school’s academic progress and reaching and teaching students with a diversity of learning styles. LEAD Public Schools may also implement extended learning for students falling behind who need extra help and will participate in all assessments required by the State of Tennessee.

The LEAD Public Schools curriculum and instructional methods begin with the MNPS District and Tennessee state standards. Therefore, our curriculum aligns directly with the District and State. In the last year, the State has moved to align its standards with the national Diploma Project standards to ensure that all students are prepared to graduate from high school and enter college or the workforce. Prior to this, the State used curriculum standards which were vague, contained many gaps and employed non-measurable verbiage. We feel that the new state standards are sufficiently rigorous to adopt them almost wholesale.

The goal of LEAD's standards, curriculum, and assessments is to ensure student success. Accordingly, it is critical that the school's standards, curriculum, and assessments are aligned with those of the district and the state. The school uses the information from all assessments to refine curriculum and classroom practices and to ensure that the school can respond to the needs of individual learners. Where these assessments reveal that students are not performing at appropriate levels, modifications to curriculum and individual student programs will be made. LEAD's goal is to have students meet or exceed the state's learning standards for their grade, as reported in achievement measures consistent with standardized assessments and other assessment tools. Each year, all LEAD Public Schools will use data from standardized tests to provide accountability, as well as to provide the administration, teachers, and parents with additional data to evaluate the effectiveness of its academic program.

To ensure that they meet their academic and character development goals, instructors at LEAD Public Schools will create meticulous lesson and school-wide plans. The development of these plans begins during the interview process when instructors first review the school's curriculum standards. Prior to staff professional development, all core instructors suggest revisions to the curriculum standards and build a curriculum framework that serves as a blueprint for the entire year's instruction. The school's training and development program ensures formative evaluation during the year as well.

### **High School Graduation Requirements and Postsecondary Readiness (*High Schools Only*)**

High schools approved by the Achievement School District will be expected to meet the Tennessee Graduation Requirements, explained at: <http://www.tn.gov/education/gradreq.shtml>

1. Explain how the school will meet these requirements. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed those required by the State of Tennessee, explain any additional requirements.
2. Describe your college/postsecondary readiness program, its standards (to the extent not addressed above), supports, and how this program will be funded and staffed.
3. Explain what systems and structures the school will implement for students at risk of dropping out of high school and/or not meeting the proposed graduation requirements.

**TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.**

LEAD follows the MNPS graduation requirements with the addition of two credits required for graduation. All students are required to take a seminar course each year (freshman, sophomore, etc) that provides a college preparatory curriculum heavily focused on socio-emotional development and study skills. All transcripts are produced through MNPS's Chancery program

and include all of the same information. Grades are calculated through Gradespeed and Chancery. We continue to use district schedule, grading, and programming software to allow a seamless transition for students coming in and out of LEAD.

Currently all college preparatory efforts are supported in the general curriculum for the seminar courses mentioned above.

Maintaining limited enrollment allows staff to know children well and track their academic progress closely. Progress reports are sent biweekly and parents are called in for conferences when students are failing. When students are identified as potentially being at risk, a team of teachers, counselors, and administrators (as necessary) develop an action plan and monitor the student progress closely. *For more detail of the course guide and graduation requirements, please see Attachment 4 to this application.*

### **School Calendar and Schedule**

1. Provide, in **Attachment 6**, the proposed calendar for the first year of operation. Explain the daily schedule of classes; academic and non-academic programs; and total number of days/hours of instruction. Detail the number of instructional hours/ minutes in the day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain how the calendar will support the success of the educational program.

2. Describe the structure of the school day and week. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade, the length of the school day, and provide, in **Attachment 6**, a sample daily and weekly schedule. What is the average number of minutes of academic instruction to be provided each day? Explain how the school's daily and weekly schedule aligns with the plan for curriculum and instruction.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

All LEAD Public Schools typically follow the traditional MNPS calendar, but add additional days in the summer and on Saturdays for a total of 10-20 additional school days per year. These days will consist of between 6-8 Saturday sessions and at least a two-week Summer Session. The school will not hold Saturday Sessions during the summer session or during holiday weekends. The Summer Session will be considered the beginning of the school year and typically commences on our about August 1 each year. *Please see Attachment 6 for the 2010-11 LEAD year calendar and our current middle and high school schedules.*

All LEAD Public Schools will use flexible scheduling models to increase interdisciplinary work and meet specific learning needs. We do, however, plan to tailor the schedule as much as possible to the calendar in MNPS without compromising our academic program. We want to be respectful of those families who have children at both an MNPS school and at a LEAD school.

The academic day at all LEAD schools is anticipated to begin at 7:30 a.m. and conclude at 4:30 p.m. on Monday, Tuesday, and Thursday. Each Wednesday, students will be dismissed at 2:30 p.m. On Fridays, students will be dismissed at 3:40 pm to allow for a school-wide or grade-level Family Gathering. The length of the day for the high school is not set as it will be several years before a 9<sup>th</sup> grade is enrolled but is anticipated to begin at 7:45 a.m. and last until at least 3:40 p.m. *A sample middle school student and teacher schedule is included in Attachment 6.*

**Summer Sessions:** The Summer Session is crucial to the overall academic success of our students. We firmly believe that the additional time our students will spend on task (>50% more than traditional public school students) provides them the time necessary to fill in the gaps they possess when they enter our program. This extra time spent in class during July and August ensures our students continue striving for college. During our summer session, students will continue their immersion in the LEAD culture of hard work and positive decision-making that is maintained throughout the regular academic year.

### **School Culture**

1. Describe your school culture and how this culture will promote a positive academic environment and reinforce student intellectual and social development.
2. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school.
3. Explain how the school culture will take account of and serve students with special needs, including students receiving special education services, English Language Learners, and any students at risk of academic failure.
4. Summarize, for illustrative purposes, a typical day from the perspective of a student in a grade level of your choice.
5. Summarize, for illustrative purposes, a typical day from the perspective of a teacher of any subject or grade of your choice.

**TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.**

A unique aspect of our approach is the spirit of teamwork and community that exists on our campus. LEAD was founded on this spirit and our ability to build and maintain strong relationships with all stakeholders in the school has been an important ingredient in our overall success. Students and staff at LEAD treat and rely on one another as family and value each other as individuals. In surveys at LEAD, students respond that they feel safe at the school and feel that it's "cool" to do good work and to work hard in school.

Relationships are critical to our success. Therefore, staff are expected to make themselves available to fellow staff members, students, and their families to work in the best interest of our students and school. While many other schools are marked by instructors closing the door during the day and isolating themselves from their colleagues, staff members at LEAD work in a collaborative manner to reach our ambitious goals of college matriculation for every one of our students.

The entire LEAD community—students, staff, families, and community partners—lives by the LEAD Ethos. We believe that success not only at LEAD but in life is a byproduct of adherence to this Ethos. For our students, the Ethos is an expectation that structures their experience at school; it forms the foundations of their character education, their personal relationships, and their growth as citizens. Our Ethos establishes the foundation of our student support system, from our discipline system, to our Crew/ advisory program, to the school's rituals, to our extra-curricular activities, to the myriad of daily interactions between teachers and students. From survey results, a vast majority of our students feel that this climate will prepare

them for college; we believe that is a strong indicator of student buy-in to our culture of academic and character excellence.

The reality is that most of our students have never participated in a serious learning environment or developed productive academic and behavior habits. We anticipate this to be true at Cameron based on our initial review of the data and the attendant problems associated with a low-performing culture. Thus, creating a positive, safe, achievement-oriented school culture is critical. This focus on culture begins by sweating the small stuff—from placing a very heavy emphasis on appropriate behavior in the classroom as well as the hallways, cafeteria and buses. Our school culture strategy relies on institutional systems that support students to take ownership for the school and responsibility for their classmates. Key elements include:

- **Student Support Team:** A multi-disciplinary team that consists of all stakeholders who work to support student advancement. Attendees at weekly meetings include the Dean of Students, any counselors or social workers working at the school, the Director of school-based social service programs, the Parent Engagement Specialist, representatives from relevant community groups, and other relevant members of the school community as appropriate. The team is proactive; building positive relationships with students, anticipating problems before they occur, mediating issues, and celebrating student achievements.
- **LEAD Contracts:** Each student and family joins the school community based on contracts they sign mutually with the school. By signing the form, each party agrees to contribute to the success of one another and to abide by the expectations, rules, and procedures outlined in the handbooks. Contracts include: Commitment to LEADership; Code of Conduct; and, Non-Violence Contract.
- **Merit/ Demerit System:** We use a token economy system called “Lucre”; students, through exceptional choices, are rewarded with points that they can use at the school store. Students lose Lucre by making poor choices, such as failing to adhere to teacher expectations or being disrespectful to a peer. We believe that mutual respect and adherence to established procedure form part of the bedrock of a successful school. At LEAD, we use a demerit system called “Marks”; students receive these for disrespect to adults or peers (both deduct the same amount) or for failure to comply with a teacher’s request. In middle school, these marks are served in a detention period during the academic day. Importantly, students DO NOT miss class time to serve these as we believe that students engaging in disruptive behavior often need more, not less, instructional time.
- **LEAD Shirt:** Wearing the LEAD uniform is an aspect of our community that we celebrate. Staff place a high expectation on students to always be in uniform: the right shirt, pants/skirt, shoes, belt, worn in the expected manner. When students do not meet expectations for a minor infraction, they are asked to wear their uniform shirt inside out as a sign that they have failed to meet expectations; it is a public sign that they regret their choice and want to make amends to the community. Rather than it being a tool to shame students, it is a technique that builds the importance and value of wearing the “L” logo on their chest.
- **RISE (Restoring Individual Student Excellence):** When students receive 5 or more marks in a two week period, they are placed on RISE, a program where students are directly retaught the expectations of the school community. RISE students lose certain privileges; they do not speak to other students (and other students are not allowed to speak to them); they wear a plain white t-shirt instead of a LEAD uniform shirt; they sit aside at lunch, working on homework or studying instead of socializing. To earn their way off of RISE, students must receive positive scores from their teachers, indicating that they have

successfully relearned the expectations of the community. The last step to their time on RISE is to write and read a letter to their class reflecting on why they earned their way on RISE, what/ who helped them to get off, and what specific steps they will take to avoid being on it in the future.

- **Parent Involvement:** Parents are welcomed and encouraged to visit the school and sit in on classes any time. Parents are active participants in invited to attend classes without prior notice, eat lunch with their children, and attend any and all LEAD events. During our Saturday School sessions, we hold Parent Talk sessions conducted by social workers, not representatives of the school. We provide parents with a hot breakfast and the opportunity to work with community members who aren't directly "from the school".
- **Responsible Living:** As part of our character education, Responsible Living is a class where we explicitly teach healthy living in a broad sense; nutrition, physical health and activity healthy relationships, responding to negativity, self-respect, and personal safety. All students will participate in this class.
- **Crew:** Another part of our character education program is our small group advisory program, Crew; we operate under the adage that "We are all Crew not passengers," underlining the point that, positively or negatively, we all produce our community together. Crews are the place where we make sure that each student is well known by at least one teacher; they meet every day and are at a ratio of no more than 15:1. Each month has a theme that guides Crew, and sessions involve activities about character education, building reflective practices, building teamwork and trusting relationships, literacy, college education, and writing. From survey results, a strong majority of our students respond that they feel that they are connected to at least one adult in the community.
- **Service-Learning:** A large part of our program is service to others. We have seen our students respond positively to genuine, meaningful opportunities to help others. Past service programs have been working with Bordeaux long term care residents and working with the North Nashville community garden. Commitment to others is an important part of helping students to understand their role in giving back to and supporting their community.

LEAD takes a comprehensive view of student development. Our program prepares each of our students to graduate from a four-year college, while at the same time instilling in them the values of community service and self-reliance needed to be productive, selfless adults. For us, this growth starts in 5th grade and builds each year, to graduation and beyond.

To create a culture of academic achievement, we hold consistently high expectations for the character and academic achievement of our students. They are expected to turn in homework, study for tests, set academic goals for tests and assessments, and push themselves beyond their limits in the classroom. Teachers facilitate this goal-setting through tracking student progress on particular lessons, standards, interim assessments, and tests. Depending on the material, teachers will publicly post progress to foster students' focus on achieving those goals and to create student ownership over their own work. Teachers will coordinate competitions among classes or grade levels focused on who can achieve the most academic success. Student success is rewarded, challenges are addressed on point and remediated. Staff use data to drive instructional practices, to celebrate student success, and identify students who need additional support (and what kind of support they need).

Students, at least once per year, conduct Student Led Portfolio Conferences where they meet with a parent or other adult to discuss a portfolio of their work; they write reflections on what

they've done, show work from the year as examples of their academic success, and talk about how they've addressed their academic challenges.

The majority of our students come from school cultures that are not focused on college preparation; "college" is often an unclear concept for them. To make college more real for students, students attend field trips to local universities, admissions staff come to the school to speak, students prepare presentations and posters about universities, and each grade level takes a trip at the end of the year to tour several university campuses.

We also create motivation to succeed by providing students opportunities to show their work to meaningful authentic audiences; when the drama class performs, students both produce the production for an audience and discuss with the audience the content of what they've learned and the artistic process they've gone through to create their product. From student surveys, students at LEAD report that the school culture is one where it's "cool" to show your work and produce strong products.

**Typical Student Day:** A typical day for a LEAD student starts between 5:30 and 6:00 when they would wake and eat their breakfast, shower, and prepare for the day. The bus would arrive at their assigned bus stop at the exact time as the day before and the student would check his/her shirt before filing onto the bus and taking his assigned seat. Reviewing his homework for the day or visiting with friends, he would wait for the bus to arrive at school at 7:15 and file quietly off the bus and walk into the cafeteria to eat breakfast. While eating, he would talk with his teachers who are present at breakfast, gathering homework for the day, checking on student progress, and answering any questions he and his peers might have. After a quiet dismissal at 7:30, he and his Crew might stay behind with a teacher to clean the cafeteria before the other school comes in an hour later for breakfast. Crew would begin promptly afterward, with the entire Crew assembling their chairs into a circle to symbolize that all are Crew, not passengers. At Crew students actively engage in leadership and team building activities. On this day, students might share their reflections on the previous day, sharing a "rose" (a positive experience) and a "thorn" (a negative experience) and how they are working to learn from both. The atmosphere is positive and supportive and students react collaboratively to the student and staff support. From Crew, students put theory into practice during their Physical Education time from 8:00-8:50, whether practicing their skills in a particular sport or tending the school garden or cleaning up the campus as part of their community service program. Following PE, our student immediately transition into their 140 min CAFÉ Reading/Writing class. In CAFÉ students work on Comprehension, Accuracy, Fluency and Extended vocabulary through small groups and whole group instruction. After completing their reading in CAFÉ, students go to lunch from 11:00 am until 11:30. Once lunch is over students again clear the food from the tables and wipe them down for the other school and move purposely to math for 70 min, followed by History for another 70 min. At 2:00 pm the entire school stops their lessons and opens a book for a 30 min reading time. Following that time, students go outside for some unstructured activity time on the playground. After, students enter their science classes, where they go from center to center working and exploring the natural world. At 4:15 students meet in their Crew groups for an Intensive Time. In Intensive Time students work on organizational skills, unfinished work from earlier in the day, and exploring other interests. Since today, is a Monday, Tuesday, Thursday schedule, students gather their belongings in their homeroom and file down to the gym all for dismissal at 4:50. For our young leader, his bus will stop in front of his apartment at the exact same time as the day before and he will file off the bus and unlock his door and begin completing his 1-2 hours of homework.

If he has questions on his homework, he will pick up the family cell phone and call one of his teachers for homework help before helping his mother with dinner and preparing his brothers and sisters for bed.

### **Typical Teacher Day:**

At LEAD Academy, the day for teachers starts around 6:30am. In the mornings before school, teachers are making copies, entering grades, organizing lessons, and prepping for the day ahead. When the students arrive at 7:15am, they are in and out of homeroom, heading to the cafeteria for breakfast, and getting help with homework. It is a great time to chat with the students, get to know them better, and form relationships that help breed success in the classroom. At 7:45am teachers start their day with CREW. Each teacher leads a gender-specific group of 12-15 students in curriculum designed to foster community, develop life skills, and promote academic success. Teachers find that this becomes one of their favorite parts of the day developing relationships with students and assisting them in their journey through high school.

Scheduling is made with both teacher effectiveness and student achievement in mind. Using an A/B block schedule, each teacher advises CREW, teaches three class periods, and monitors or teaches during study hall each day. The students have a 50-minute study hall where some students participate in extra electives like art and debate while others attend remediation classes for math or reading. Each teacher has two class periods off. One of those periods is spent in grade level team meetings. The core 9<sup>th</sup> grade teachers all have planning together to discuss behavior and academic concerns, plan field studies, and have parent meetings. The second planning period is scheduled to ensure that subject-area teachers can meet together, grade together, or collaborate on lessons. These well-planned periods ensure that teachers and teams have the opportunity to become more effective in their classrooms.

All teachers assist in lunch and R&R duties each week: three days on and two days off. R&R is twenty minutes after lunch for students to socialize and play sports. R&R is held outside on the playing fields when the weather is nice and provides students with downtime during the school day.

After school, time is spent informally collaborating with fellow teachers or attending school-wide professional development on Wednesdays. Professional development is tailored to reflect the issues or concerns that are happening in the school. Teachers use protocols to develop ideas and solutions and give feedback to each other. One day a week each teacher holds tutoring for students after school. Most teachers leave school around 5:00pm each day, but the day is not officially over. Students and parents have each teacher's cell phone number and e-mail to use for questions with homework and updates on grades. Students and parents are encouraged to not call teachers past 8:00pm each night.

### **Supplemental Programming**

1. Will you offer summer school? If so, describe the program(s) to be offered. How many students are expected to attend summer school, and how will they be selected for participation? How many hours and weeks of summer school will you provide, and how will it be funded?
2. Describe the extra- or co-curricular activities or programming you will offer, how often they will occur, and how they will be funded.



3. Describe your programs or strategies to address student mental, emotional, and social development and health.

4. If applicable, describe any other student-focused activities and programs that are integral to your educational and student development plans.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

**SUMMER SCHOOL:** LPS provides an annual summer school program for students who wish to receive additional reinforcement of concepts and for students who are credit deficient. Estimated participation, based on prior year experience, is approximately 10-20% of students and as we expand we expect our summer programs to expand accordingly. During the most recent year our summer school credit recovery programs were targeted at reading and math courses only. Additional courses will be added in the future.

**LEAD SERVICE-LEARNING PROGRAM:** At LEAD we take our responsibility to create productive, responsible citizens seriously. Research has consistently shown that when students learn to give back to their communities the benefits extend far beyond the students. By serving our community regularly, LEAD students will gain the confidence in their abilities needed to see themselves as active citizens able to shape their history, community, and personal life; neighborhoods and communities will benefit from having active community partners and will engage them in the daily life of LEAD Public Schools and the school and instruction will benefit greatly from the promotion of what researchers call, “action-based engagement with conditions of personal need and social inequality.”

The Service-Learning Program, internships, and our community service requirements are integral parts of the 8<sup>th</sup> Grade Capstone Community Action Project and graduation requirements. Service-learning will be generated through the curriculum to ensure classroom and world experiences are connected. Additionally, the students will gain valuable experiences practicing the skills they acquired in the classroom, art room, and science lab. This linkage enhances our curricular concepts and *Core Habits* development and linking the academic program with real-life situations, challenging our students to apply their skills to their worlds. All instructors receive quality training to ensure alignment with Tennessee standards for service-learning.

The unique LEAD Service-Learning Program integrates our rigorous college-preparatory curriculum with our instructional approach, observed national best practices, and meets our rigorous community needs assessment (conducted in partnership with community service organizations, neighborhood associations, and accredited social service representatives). It also allows our students to learn and develop by actively participating in thoughtfully organized experiences that meet actual community needs, are integrated into our rigorous college preparatory curriculum, provide structured time for reflection, and extend student learning past the classroom walls.

Students may become participants in housing reform by volunteering at Habitat for Humanity, health care by working at a nursing home or hospice center, environmental change by managing a wetland, neighborhood revitalization by participating in community redevelopment projects, and citizen engagement by organizing neighborhood involvement.

The ultimate goal behind our service-learning expectations is to build the basic link in our students between self and society and the necessary role each of us plays in building and maintaining a healthy society. The key elements of LEAD’s Service Learning Program conform to the Tennessee state service-learning standards including:

- **Preparation:** Students demonstrate youth voice and identify community needs.
- **Action:** students implement meaningful service.
- **Structured Reflection:** Students think critically about their service experience and what they learned.
- **Celebration/Demonstration:** Students' projects are recognized and they, in turn, educate others about their experience.

**LEAD RESPONSIBLE LIVING PROGRAM:** A student's time at LEAD represents the journey of leadership. All leaders are men and women of the highest moral character and character is never given or bestowed, but earned. And all leaders learn first then, achieve mastery and, finally, model their knowledge so that others learn from their example. As Aristotle realized so long ago, "We become what we habitually do."

Whatever words we use to describe it, good students—like good leaders—lead by example and by virtue that example, lead others. They rely not only on what they know but on what they are. Particularly in at-risk youth, success requires great strength. It requires determination, persistence, humility, and the subordination of self, sensitivity, and sensibility. It requires integrity and honor. Perhaps more than any other single quality, it requires self-discipline. Frequently, it also requires courage.

LEAD's Responsible Living Program has been designed to help each of our students lead because that is who they are. To help all of our students develop the positive habits that make up what we generally refer to as character, we have consciously carved out time during our daily schedule that focuses on responsible living. In this class, students learn about developing and maintaining a healthy lifestyle through a variety of learning experiences and opportunities. Classes are designed to provide the knowledge and skills students need to consistently make healthy decisions. Program team members will include local doctors, nurses and medical practitioners, local and state government agencies and programs, area non-profit service providers and program staff, academic, athletic and intramural coaches, recreation and after-school staff, LEAD instructors, community members, role models, nutritionists, organic farmers, and outside experts, among others. Classes range from discussions on alcohol, drug and tobacco use, to sexual behavior, and to course work on emotional development, nutrition, and psychology. The program will include organization and planning skills, especially during the middle school years, since these skills form the foundation of healthy lifestyles. The program includes a physical fitness component.

**College-Counseling Program:** Reaching the goal of 100% high school graduation and college acceptance requires every member of the LEAD community to take a "*Whatever it Takes*" attitude. The end—college graduation—will drive our decisions. As such, we have adopted the academic, career development, and personal/social development standards that were developed by a team of thirty-three Tennessee school counselors, teachers, administrators, parents, community members and state department personnel.

The college-counseling department will be responsible for focusing the entire school on the successful graduation and college acceptance of all of our students. This will include supporting the school's overall efforts to plan, implement, and evaluate the comprehensive college matriculation and alumni support programs that will fulfill the LEAD mission across appropriate grade levels. The college counseling department will be significant, as they will play a pivotal role at the critical stage of assisting and guiding our students and their families through the entire

college application process. Responsibilities of the department staff will include, but are not limited to:

- Researching, establishing and maintaining long-term relationships within the college admissions arena, including, but not limited to, college admissions counselors, directors and university outreach centers.
- Working with appropriate grade level chairs and summer opportunities coordinators to ensure that every student in every grade level is participating in available college-related activities when possible, including, but not limited to, summer programs and Talent Identification Programs.
- Helping coordinate registration, supervision and other related issues regarding standardized tests administered to all LEAD students, including, but not limited to, SAT I, ACT, SAT II, AP tests, TCAP, Gateway, ACT Explore and PSAT/SAT Prep course.
- Helping coordinate and host high school visits and college fairs at LEAD schools by college admissions representatives.
- Directly advising and counseling 100 seniors per year and assisting with all aspects of implementing a comprehensive college-counseling program.
- Working closely with appropriate grade level chairs to coordinate and facilitate the Student/Faculty Advising Program among 9<sup>th</sup>-11<sup>th</sup> grade levels.
- Teaching at least two classes during the school year, including one Senior Seminar section (College 101), as well as a junior seminar class.
- Implement the Curriculum and Scope and Sequence of the Senior Seminar course mimics College Admissions Process.
  - First Quarter - *Narrowing and Refining Your College Search*
  - Second Quarter - *Implementation of College Admissions Process* (applications, essays, resume, etc.)
  - Third Quarter - *Follow-up on Applications/How to Pay for College* (scholarships, financial aid, forms, etc.)
  - Fourth Quarter - *Letting Go Process/Transition to College* (Letting Go Sessions, Transition Sessions, Exit Interviews)
- Discussions held on issues relevant to students through selected books (e.g. race/ethnicity, socio-economic, first-generation, etc.).
- Serve as primary point person for College Counseling staff for the following areas and others as they arise: Financial Aid and Scholarships, Testing and Preparation and College Visitation Program.
- Work closely with the College Counseling staff and Registrar to ensure that all high school students are in compliance with state regulations regarding high school credits and that they are reported in an efficient and easy manner to external evaluators.
- Assist with other administrative duties when necessary, including lunch duty, bus duty, staffing of front office and administrative duty, coverage of homeroom/study hall duties, grade level and departmental responsibilities.
- For parents, hold a Summer Orientation Meeting in early August of each high school year to prepare the families for the upcoming responsibilities and expectations. Additional informational Parent Meetings are held throughout year (August, December, January, March, April and summer) on specific topics most relevant to their son/daughter and their college application process.
- Serve as an active and committed member of school-based teams.

- Adhere to the national regulations and responsibilities associated with the college-counseling role as outlined by the National Association for College Admission Counseling (NACAC) and the Southern Association for College Admission Counseling (SACAC).

In addition to an emphasis on advanced placement course work, college counseling to students and parents will be critical to the success of the high school. All instructors will be trained in counseling students and parents in the following areas:

- College selection
- SAT/ACT preparation
- College applications
- Scholarship applications
- GPA, class rank, and transcripts
- Financial aid.

### **Special Populations and At-Risk Students**

Charter schools are responsible meeting the needs of all students enrolled at the school including those identified with special needs. School personnel shall participate in developing Individualized Education Programs (IEPs), identify and refer students for assessment of special education needs, maintain records, and cooperate in the delivery of special education instruction and services, as appropriate.

1. Describe your overall plan to serve students with special needs, including but not limited to those with Individualized Education Programs, students with Section 504 plans, English Language Learners, students identified as intellectually gifted, and students at risk of academic failure or dropping out. Identify the special populations and at-risk groups that the school expects to serve, whether through deliberate targeting or otherwise.

2. Explain how you will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies and supports you will provide for students with mild, moderate, and severe disabilities, including:

- a. How the school will identify students with special education needs.
- b. The specific, research-based instructional programs, practices, and strategies the school will employ to provide a continuum of services, ensure students' access to the general education curriculum, and ensure academic success for students with special education needs.
- c. How the school will regularly evaluate and monitor the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals set forth in the Individualized Education Program (IEP).
- d. If applicable, the school's plan for promoting graduation for students with special education needs.
- e. How the school will provide qualified staffing for students with special education needs.
- f. Provide examples of how you have adjusted the course scope and scope and sequence, daily schedule, staffing plans, and/or support resources to meet the diverse needs of

students at existing schools.

3. Explain how you will meet the needs of English Language Learner (ELL) students, including:
  - a. How the school will identify ELL students.
  - b. The specific instructional programs, practices and strategies the school will employ to ensure academic success and equitable access to the core academic program for these students.
  - c. How the school will assess and monitor the progress and success of ELL students, including exiting students from ELL services.
  - d. How the school will provide qualified staffing for ELL students.
4. Explain how you will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies and supports you will provide for these students.
5. Explain how you will identify and meet the needs of intellectually gifted students, including:
  - a. The specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
  - b. How the school will provide qualified staffing for intellectually gifted students.
  - c. How the school will assess and monitor the progress and success of intellectually gifted students.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

All students at LEAD Public Schools will be well known and supported by staff, instructors, and community members. Caring and dedicated adults will follow each student's academic progress and character development over time. School structures, such as Crew, study halls, service learning, electives and extra-curricular offerings, and after-school access to instructors and staff, ensure students' needs are met and individual strengths are discovered and nurtured. LEAD Public Schools will provide all students with access to the general academic curriculum as well as all other educational programs and services provided for other students. Non-academic services and extracurricular activities will be provided in a manner that affords children with disabilities an equal opportunity for participation.

All students with disabilities will be educated in the mainstream classroom environment unless the IEP requires otherwise. A student whose IEP stipulates that s/he be educated outside the mainstream classroom environment will be educated in the Least Restrictive Environment and given all the support and resources necessary to succeed. Students with special needs will be given every chance to excel and are mainstreamed into the educational program. A Collaborative instructor monitors each student's individual needs. All faculty and staff will be aware of any necessary modifications and subscribe to the philosophy of doing "*Whatever it Takes*" to ensure that all students achieve success.

A Collaborative Special Education teacher monitors each special education student's individual needs. Students with special needs will be given all the support necessary to ensure their success. All faculty and staff will be aware of the instructional modifications to ensure all students achieve academic success. Yet, if additional services are written into the IEP, services

will be provided in the most appropriate environment to be in accordance with Free and Appropriate Public Education (FAPE). The Collaborative Instructor(s) will work collaboratively with the general education instructors to teach classroom lessons with appropriate delivery so special education student are successful.

All LEAD Public Schools employ highly-qualified Collaborative Special Education instructors who will be responsible for individual case management of all special education students and for arranging the provision of services required by their IEP. Before school opens and during the first semester, the Collaborative instructor will collect all student records from MNPS. A file demonstrating the school's compliance with providing special education will be maintained at all times. It is our intention to offer all students an inclusion program, in addition to more time on task. Students with special needs may also receive one-on-one tutoring or other related services needed to ensure that they find success.

**Transition Services:** Beginning not later than the first IEP in effect when the student is 16, and updated annually thereafter, a student's IEP will contain a transition services plan, which will be initiated by the school's Collaborative Instructor through the regular IEP process.

**Evaluation Process for Students with Learning Disabilities:** Individual LEAD schools will be responsible for the hiring, training, and employment of site staff necessary to provide special education services to its students, including, without limitation, special education teachers, paraprofessionals, and resource specialists. Each LEAD school has the responsibility to identify, refer, and work cooperatively in locating students who have or may have exceptional needs that qualify them to receive special education services and implement policies and procedures and state and federal requirements to ensure timely identification and referral of students who have, or may have, such exceptional needs. A pupil shall be referred for special education only after the resources of the regular education program have been considered, and where appropriate, utilized. All LEAD schools follow child-find procedures and state and federal law to identify all students who may require assessment to consider special education eligibility and special education and related services in the case that general education interventions do not provide a free appropriate public education to the student in question. To be identified as a student with a learning disability, a group of qualified individuals must find that:

1. The child does not achieve adequately for the child's age or to meet State-approved grade level standards in one or more of the following areas, when provided with learning experiences and instruction appropriate for the child's age or state-approved grade-level standards in one or more of the following:
  - a. Oral Expression
  - b. Listening comprehension
  - c. Written expression,
  - d. Basic reading skills,
  - e. Reading fluency skills,
  - f. Reading comprehension,
  - g. Mathematics calculation,
  - h. Mathematics problem solving;
2. The child does not make sufficient progress to meet age or state-approved grade-level standards in one or more of the areas identified above when using a process based on the child's response to scientific, research-based intervention; or the child exhibits a pattern

of strengths and weaknesses in performance, achievement, or both, relative to age, state-approved, grade-level standards or intellectual development, that is determined by the group to be relevant to the identification of a specific learning disability, using appropriate assessments; and

3. The group determines that its findings are not primarily the result of:
  - a. A visual, hearing, or motor disability;
  - b. Mental retardation;
  - c. Emotional disturbance;
  - d. Cultural factors;
  - e. Environmental or economic disadvantage; or
  - f. Limited English proficiency.

To ensure that underachievement in a child suspected of having a specific learning disability is not due to lack of appropriate instruction in reading or math, the group must consider, as part of the evaluation:

- a. Data that demonstrate that prior to, or as a part of the referral process, the child was provided appropriate instruction in regular education settings, delivered by qualified personnel; and
- b. Documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of student progress during instruction, which was provided to the child's parents. (34 C.F.R. § 300.309)

Only after the above interventions have taken place, and the team has considered the “rule-out factors”, can the child be determined to have a specific learning disability. Each ELL/LEP student with disabilities will be assessed for English proficiency using accommodations and modifications as set out in the IEP or Section 504 plan. All LEAD schools will implement policies to assure proper placement, evaluation, and communication regarding ELL/LEP students as well as the rights of students and parents.

**Section 504:** All LEAD Public Schools comply with all applicable State and Federal Laws in serving students with disabilities, including, but not limited to, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act and the Individuals with Disabilities in Education Improvement Act (“IDEIA”). A 504 team will be assembled by the School Director and shall include the parent/guardian, the student (where appropriate) and other qualified persons knowledgeable about the student, the meaning of the evaluation data, placement options, and accommodations. The 504 team will review the student's existing records; including academic, social and behavioral records, and is responsible for making a determination as to whether an evaluation for 504 services is appropriate. The student evaluation shall be carried out by the 504 team who will evaluate the nature of the student's disability and the impact upon the student's education. The final determination of whether the student will or will not be identified as a person with a disability is made by the 504 team in writing and notice is given in writing to the parent or guardian of the student in their primary language along with the procedural safeguards available to them. If during the evaluation, the 504 team obtains information indicating possible eligibility of the student for special education per the IDEIA, the 504 team will make a referral for assessment under the IDEIA.

**Students Achieving Below Grade-Level:** Low-achieving students will be identified as students who achieve at the lowest quartile on a standardized test and/or are below or far below basic on our grading rubric. A major emphasis of the LEAD curriculum structure and instructional strategies outlined here is to maximize the learning opportunities of low-achieving students. All students are thoroughly integrated into the entire student body and participate fully in all aspects of the curriculum.

Parents of low-achieving students will be contacted before the end of the sixth week of the school. Parents will be notified of available interventions including the After School Program through the use of a Student Support Team (SST) meeting. At the end of the second grading period, parents will be notified if their child has not made sufficient progress towards meeting the standards for promotion. They will be informed at another SST meeting which standards their child is still not meeting at grade level. LEAD Public Schools will screen the following data to identify at-risk students:

1. Students scoring below the 25<sup>th</sup> percentile on the previous year's standardized test in any one subtest score in Reading, Language Arts, or Math.
2. Students who are at least one year below grade level in the areas of reading, written language and math, identified by informal teacher assessment or prior progress reports.
3. ELL students in transitional reading for more than one year.
4. Students scoring at below basic or far below basic on the TCAP tests.

**Students of Low Socio Economic Status:** Based on our first schools, including Cameron College Prep, we anticipate future schools will serve a majority minority and poverty student body with high special needs and, potentially, a high number of ELL students, with the majority of the students having basic skills deficiencies. Therefore, all instructors will be trained to focus on prevention of learning problems rather than remediation. Instructors and support staff are provided with manuals, curriculum materials, lesson guides and other support materials to ensure that students that are below grade level are offered systematic alternatives to traditional instruction methods. Instructors and support staff use a variety of instructional methods to actively monitor student learning and maintain awareness of academic difficulties. In addition, students will receive instruction in study skills, test-taking skills and other learning successful strategies including summarizing, questioning, and predicting. Rooted in our firm belief in accountability, all LEAD schools will utilize rigorous assessment and goal-setting programs to measure students' proficiency levels and ensure that each student is making progress toward becoming a responsible, well-educated adult. Students are assessed regularly from the time they enter the school through graduation and teachers monitor their progress closely and make decisions in real-time, based on immediate data. Afterschool tutoring and Saturday school programs are run by staff to supplement classroom instruction for students who are struggling to master grade-level skills. Additionally, regular professional development is conducted for staff to review data and support all students and their mastery. (*see Professional Development section below*)

**English Language Learners (ELL) and Limited English Proficient Learners (LEP):** All LEAD schools will meet all applicable legal requirements for English Language Learners as it pertains to annual notification to parents, student identification, placement, program options, ELL and core content instruction, teacher qualifications and training, reclassification to fluent English proficient status, monitoring and evaluating program effectiveness, and standardized



testing requirement. The goal will be to develop high quality instructional programs and services for ELLs that allow them to achieve the same challenging grade level and graduation standards, in the same proportions, as native-English speaking students. The English language literacy intensive component of our program supports ELLs by providing a teaching staff qualified in second language pedagogy, an after school and summer school program with a strong language literacy focus, and additional bilingual teacher's aides in the classroom to assist ELLs in English intensive classes. All LEAD schools offer the core content areas in a sheltered English environment for students who are not proficient in English. Sheltered content classes are subject matter content courses designed specially for ELL students. The curriculum content for the sheltered English classes will be the same as in the English only classrooms.

**Non-standard English Speakers:** Recognizing that many students may not be standard English speakers, many of the same guidelines and programs listed above will be followed for them so as to ease their transition into Standard English. Specific strategies include modeling standard English; building student communication skills through structured classroom participation in oral language presentations for project-based learning culminations; training teachers in recognizing non-standard English language interference with learning; establishing a culture of appreciation for home language usage and culture and recognition of the importance of standard English usage in the world of work and education.

LEAD Public Schools will implement policies to assure proper placement, evaluation, and communication regarding ELL's and the rights of students and parents.

- **Home Language Survey:** LEAD will administer the home language survey upon a student's initial enrollment into school.
- **TN State English Proficiency Testing:** All students who indicate that their home language is other than English will be tested within thirty days of initial enrollment and at least annually thereafter between July 1 and October 31st until re-designated as fluent English proficient. The school will notify all parents of its responsibility for testing and of results within thirty days of receiving results
- **Reclassification Procedures:** Reclassification procedures utilize multiple criteria in determining whether to classify a pupil as proficient in English including, but not limited to, all of the following:
  - Assessment of language proficiency using an objective assessment instrument including, but not limited to, the ELDA and/or CELLA
  - Participation of the pupil's classroom teachers and any other certificated staff with direct responsibility for teaching or placement decisions of the pupil to evaluate the pupil's curriculum mastery
  - Parental opinion and consultation, achieved through notice to parents or guardians of the language reclassification and placement including a description of the reclassification process and the parents opportunity to participate, and encouragement of the participation of parents or guardians in the school district's reclassification procedure including seeking their opinion and consultation during the reclassification process
  - Comparison of the pupil's performance in basic skills against an empirically established range of performance and basic skills based upon the performance of English proficient pupils of the same age that demonstrate to others that the pupil

is sufficiently proficient in English to participate effectively in a curriculum designed for pupils of the same age whose native language is English.

- The Student Oral Language Observation Matrix will be used by teachers to measure progress regarding comprehension, fluency, vocabulary, pronunciation, and grammar usage.

**English Language Learner Instruction and Intervention Strategies:** Teachers will be trained to use Specially Designed Academic Instruction in English (SDAIE) techniques to meet the needs of English language learners. The instructional design model to be used by LEAD places a heavy emphasis on differentiating instruction to meet the needs of English Language Learners based on their academic and language readiness. Through the well-defined professional development plan that accompanies this instructional design model, teachers will be trained on a variety of instructional strategies to be used specifically with English Language Learners. These strategies include, but are not limited to the following techniques:

- **Total Physical Response (TPR):** A language-learning tool based on the relationship between language and its physical representation or execution.
- **Cooperative Learning:** Robert E. Slavin's (1995) research indicates that cooperative learning can be an "effective vehicle for learning content and learning in a second language" (Calderon, 2001; Cohen, Lotan, Scarloss, & Arellano, 1999; McGroarty, 1989, as cited in Calderon, 2001, p. 280).
- **Language Experience Approach (Dictated Stories):** This approach uses students' words to create a text that becomes material for a reading lesson (Carrasquillo & Rodriguez, 2002). This approach allows students to bring their personal experiences into the classroom—especially important for culturally diverse students (Peterson, Caverly, Nicholson, O'Neal, & Cusenbary, 2000).
- **Dialogue Journals (Interactive Journals):** This approach is a way for teachers to engage students in writing. Students write in a journal and the teacher writes back regularly, responding to questions, asking questions, or introducing new topics.
- **Academic Language Scaffolding:** The term "scaffolding" is used to describe the step-by-step process of building students' ability to complete tasks on their own (Gibbons, 2002) including modeling academic language; contextualizing academic language using visuals; and using hands-on learning activities that involve academic language.
- **Native Language Support:** Whenever possible, ELL students will be provided with academic support in their native language (Thomas & Collier, 2002). According to Lucas and Katz (1994), a student's native language serves several important functions: it gives students "access to academic content, to classroom activities, and to their own knowledge and experience." In addition, they found that it also "gave teachers a way to show their respect and value for students' languages and cultures; acted as a medium for social interaction and establishment of rapport; fostered family involvement, and fostered students' development of, knowledge of, and pride in their native languages and cultures."

The needs of ELL students are focused on the idea of immersion of the student in a strong academic core program, like that provided to every other student. In addition, they will be provided intensive English-as-a-Second-Language instructional methods. All students will be grouped heterogeneously so that every student can learn from one another. Accordingly,

immersion in the regular classroom will be the preferred model for mastering the English language. Should a child not be officially identified as ELL/LEP, s/he will be monitored regularly via various assessment techniques to ensure their retention of material.

**Remediation and Accelerated Learning:** All LEAD staff analyze student performance and regularly implement diagnostic testing to assess the needs of every student upon entrance to the school. The assessment will be used to detect learning strengths, weaknesses, and/or disabilities, psychological (social and emotional) development, and speech and language attainment. If a student is identified, as potentially having special needs, a plan for Students at Risk of Retention, English Learners, and/or Special Education will be implemented. We recognize that students who are gifted and talented also have special needs and will provide appropriate identification and instructional strategies to meet their needs. The following specific strategies have led to the success of all students at existing LEAD schools with similar demographics and student needs:

- Diagnosis of student needs
- Personal learning plan for each student
- Differentiated instruction in our classrooms
- Math and/or reading support class in addition to regular grade level math and reading course
- Individual tutoring using artificial intelligence online tutoring including BrainPop, Discovery Education, and Study Island.
- Summer math and reading bridge programs for new and continuing students performing below grade level
- After school and Saturday instruction and tutoring to accelerate learning
- High expectations for all students including English learners and students with special needs.
- Rather than set lower expectations for some students, our schools have high expectations for all students. We believe that some students need more support and time to get there.

The special needs of gifted and talented students will be addressed through differentiated classroom instruction, enrichment programs after school and through partnerships with community colleges. All LEAD schools provide challenging curriculum and instruction to gifted and talented students capable of achieving significantly beyond the level of their peers. This includes providing a rich academic program that addresses both acceleration and differentiation and continually reviewing student data to increase the number of gifted and talented students. Our criteria extends beyond the intellectually gifted to students who are gifted, talented, or both in areas such as specific academic ability, leadership, visual and performing arts, and creativity.

Differentiated curriculum based on the core curriculum will be provided during the regular school day through part-time and cluster grouping. Other differentiated learning activities will be utilized such as, extended day classes, Saturday seminars, independent study, and after-school and weekend club activities including, Junior Achievement Biz Town, Math Counts, Nashville Debate League, and Model U.N.

### **Student Recruitment and Enrollment**

1. State the maximum enrollment *school-wide* and *per grade level* you are setting.

2. Explain the plan for student recruitment and marketing that will provide equal access to interested students and families. Specifically describe the plan for outreach to families in poverty; academically low-achieving students; students with disabilities; and other youth at risk of academic failure.
  
3. Provide, as **Attachment 7**, the school Enrollment Policy, which should include the following:
  - a. Any admission requirements, including explanation of the purpose of any pre-admission activities for students or parents
  - b. Tentative dates for application period; and enrollment deadlines and procedures, including explanation of how the school will receive and process Intent to Enroll forms
  - c. Lottery dates (tentative) and procedures
  - d. A timeline and plan for student recruitment and enrollment
  - e. Policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

**Anticipated Five-Year Enrollment for Conversion:** LEAD’s ideal grade level size for a conversion is 140 students in middle school, small enough to maintain the proven advantages of a student-centered, personalized learning environment, while maximizing the diversity afforded by a medium-sized grade. LEAD anticipates adding students in grades 6-9 to reach ideal enrollment levels in the event of student departures from earlier grades, and to a lesser degree in grades 10-12. Obviously, in a conversion situation we expect these numbers to vary and possibly increase.

Year	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Yr 7	Yr 8
<b>Grade 5</b>	140	140	140	140	140	140	140	140
<b>Grade 6</b>		140	140	140	140	140	140	140
<b>Grade 7</b>			140	140	140	140	140	140
<b>Grade 8</b>				140	140	140	140	140
<b>Grade 9</b>					125	125	125	125
<b>Grade 10</b>						110	110	110
<b>Grade 11</b>							105	105
<b>Grade 12</b>								100
<b>Total</b>	140	280	420	560	685	795	900	1000

**Outreach and Student Recruitment:** Initially, the two primary objectives behind our outreach process are to first, engage the new school’s community in political and resource support for the start-up of the new school and second, to recruit students. Both will be essential for the successful start-up and operation of every new LEAD school. Once the school has opened, we will continue to actively encourage and seek the involvement of parents and community leaders as partners in achieving LEAD’s mission. Educating our youth is a responsibility that must be shared by the community as a whole. Our underlying philosophy is based on the belief that all students can and do learn when they feel part of a community. To this end, our vision encourages parents and community leaders to partner with faculty to create an atmosphere where all students’ needs are being met, and community partnerships are integral to the schools’ success.

Our organizational structures and the staff positions ensure that we are taking a holistic approach to preparing our students for college, leadership and life and engaging all community members in our success. The mission and success of our other LEAD Schools have been enhanced by the strong relationships we have established with our families, community members, social service organizations, and other stakeholders. Reaching out and building these connections, while sometimes challenging, has proven to be absolutely essential. Many of the individuals we have met in our pursuit of “building community” are very influential and have given us very valuable institutional knowledge and historical perspective about our community. Their views have strongly influenced important decisions about school policies and investments, such as important schedule changes and curricular enhancements. Community and parental engagement is a core LEAD value, a key piece of our strategic plan, and an expectation for our staff. We expect the same commitment to building community from all of our staff at new LEAD Public Schools, especially upon approval of this proposal.

<b>Parent Information Sessions</b>	These information meetings were held at the feeder elementary schools to inform parents of the change at Cameron the next year
<b>Church information sessions</b>	These information meetings were held at area churches, usually during a Sunday morning service to give information to potential parents
<b>Door-to-door recruiting</b>	This outreach consisted of going door-to-door throughout the Cameron zone, talking with parents and students about their options and choices
<b>Open Houses</b>	These were opportunities for parents to come and see both LEAD campuses and visit Cameron to learn more about how we “do school.”
<b>Council and Neighborhood meetings</b>	These meetings were usually used as networking meetings to see if there were potential partners or people who could support our efforts in the Cameron community
<b>School Meetings</b>	These meetings were usually conducted in conjunction with a standing MNPS event, giving the Outreach Director the opportunity to meet potential parents in the school setting. Meetings also included presentations and fun events during school sessions with the feeder schools
<b>Community events</b>	This outreach was typically conducted in conjunction with a pre-existing community event or gathering, and consisted of having informational pieces available at community gatherings
<b>Media (radio)</b>	This effort was aimed at radio outlets in both the African-American and Latino communities
<b>Advertising</b>	This outreach was done using both direct mail pieces and posters set up in area businesses and community centers
<b>Phone Calls</b>	This method was accomplished using data pulled from Chancery to call parents directly, inviting them to events, and to follow up on information already sent or received.

The chart above outlines the outreach efforts that LPS and Cameron staff employed to lead to a successful school opening. It is included here as an example of the type of outreach efforts that LPS has conducted in the past and expects to conduct for future phase-in conversions. Upon approval, the LPS CEO and Director of Parent/Community Engagement, along with the School Director (when hired), will engage with the community and reach out to parents, community leaders, elected officials, local clergymen, etc. to personally listen, learn, and collaborate. Community leaders and influencers may include business leaders, church leaders, community activist groups, neighborhood associations, and business associations.

Next, a school development advisory committee will be formed from community representatives to advise the School Director during the startup of the school. The CEO, Parent/Community Engagement Directors, and School Director will facilitate a series of planning sessions that enable the community to contribute to the design of the school within the non-

negotiable parameters of the LEAD Model. Once the school is opened this committee transitions to form the School Advisory Committee that will provide on-going advice and help in keeping the community engaged and provide important feedback to the School Director and staff.

The School Advisory Committee will use a variety of mechanisms to engage broader community members including direct mailing to parents of students in the target community, orientation meetings, public forums, open houses, articles in local print publications, participation in local events, radio shows, and by simply meeting door to door with the neighbors of the school. During multiple one-on-one and group meetings with parents and community leaders following the opening of school, LEAD listens to what parents and community members want for their school. For example, our decision to shorten the school day on Wednesday to allow families to attend church is in direct response to input from parents.

Each school will have its own web page on our website that will contain essential information about its program, requests for suggestions from the community, and the contact information for the Director of Family Engagement and the School Director. Flyers and other print collateral will be created to explain the school program and how the local community can become involved. Monthly newsletters will be distributed to parents and community members updating the progress of the school.

LPS has also developed an important partnership with the Family Resource Centers in Nashville, especially at Fall-Hamilton to provide support for our families and community members. It is our intention to host a Family Resource Center at or near the new LEAD campus that will provide family support, training, and resources. The center will be available to parents beyond normal school hours and will offer classes at off hours for parents who have conflicts.

Since every new LEAD Public School will serve students from the existing MNPS school attendance zone, all students who are zoned for the school will have first priority for spaces. If all seats are not filled, students outside the attendance zone will be enrolled based on the charter school eligibility guidelines.

Despite the unique nature of the transformation school attendance zone, we plan to undertake a similar recruitment effort as we use at LEAD Academy and Cameron College Prep. We believe that demonstrating to our families and students that their presence at the new school is important as well as a choice. We have found that when parents are engaged early in the process and students are told what to expect at the school, the investment is much greater than if we simply wait for students and/or families to show up. The primary recruitment method is to get the word out to parents through the community engagement strategy. Prospective 5th grade students are recruited at local elementary schools using flyers and presentations at parent events and at parent association meetings. The School Director and staff will meet students and parents at information and orientation meetings and an open house meeting prior to the opening of school.

Due to these efforts, we feel confident that the school, its mission, and expectations will not only be accepted by the community but actively supported. Formal outreach efforts will commence upon formal acceptance of this charter proposal.

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parents at information and orientation meetings and an open house meeting prior to the opening of school.

All LEAD Public Schools will seek to achieve a racial/ethnic balance reflective of the Nashville communities our schools serve. All LEAD schools will be open to any student and parent in Davidson County who resides in the school zone and who chooses to attend. Recruitment efforts will be aimed primarily within the zoned community. At all times, the new LEAD Public Schools will comply with State regulations and recruit and enroll students from the target population. We will take the following steps to ensure that students representative of each school's respective communities continue to be recruited:

- Visit local schools and organizations in each neighborhood; host a meet and greet lunch with guidance counselors and church leaders
- Seek referrals from school teachers, students and families, particularly 4<sup>th</sup> grade teachers at targeted feeder schools
- Visit homes and explain to prospective students and their families the purpose of LEAD
- Conduct parental information sessions to elaborate on the commitment involved with attending LEAD
- Run a public service announcement with target radio stations
- Place advertisements in local newspapers and community association newsletters
- Post flyers and notices in local supermarkets, churches, community centers, and apartment complexes
- Distribute promotional materials such as water bottles, t-shirts, and pencils at all recruiting events and meetings

Admission to all LEAD schools will be a cooperative decision between students, parents, and teachers. Students and parents must choose to enroll in a LEAD school. We therefore encourage and motivate students and their families to view intense academic commitment as their key to the future. Students, parents, and instructors are expected to sign a Commitment to LEADership form, which addresses expectations for attendance, homework, behavior, and academics.

**Non-discrimination Policies:** All LEAD schools comply with all State and Federal regulations regarding non-discrimination and will not discriminate against any student, parent, employee, or community member on the basis of race, ethnicity, national origin, religion, gender, or disability. LEAD will strictly maintain a nonsectarian approach to all its programs, events, admissions policies, employment practices, and all other operations. LEAD will never charge tuition.

### **Student Discipline**

1. Describe the philosophy of student discipline that supports your school model. How will parents be informed of the school discipline policy?
2. Provide, as **Attachment 8**, the school discipline policy, which should include the following:
  - a. Practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior
  - b. A preliminary list of the offenses for which students in the school must (where non-discretionary) and may (where discretionary) be suspended or expelled, respectively
  - c. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings

- d. A description of the appeal process that the school will employ for students facing expulsion.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.  
WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK.

A safe, supportive learning environment is critical for successful student development both in and out of the classroom. However, most discipline procedures are based exclusively on the Behaviorist Theory where good behavior is rewarded and bad behavior is punished, in the hope that students will automatically adopt good behavior and eliminate bad behavior to gain the rewards and avoid the punishments. We recognize that the habits of tolerance, self-reliance, thoughtful debate, civic involvement, and hard work must be taught, exercised, and owned daily in order to become habitual. As our mission states, at our schools we instill these *Core Habits of Leaders* at an early age, develop them through the middle school years, and refine them at the high school level.

The goal of the our Code of Behavior and Discipline is to create and sustain a school culture focused on excellence, respectful of diversity, and dedicated to the development of positive habits. Therefore, we have created specific policies, procedures, and a comprehensive support system to ensure such a school culture is created and developed throughout the school year.

Students at LEAD Public Schools will be taught to internalize the school's *Core Values* and *Core Habits of LEADers*. As students progress through LEAD, they will gradually take ownership of these values and habits they will need to use and rely upon these to take advantage of a wealth of opportunities in life. The school's ultimate purpose is both to equip its students not only to earn expansive life opportunities, and to give students the values they will need to make wise decisions under any circumstance.

Our approach to discipline is that it is about teaching self-discipline not about teachers or administrators levying consequences or reacting to student behavior. Only when students internalize the beliefs of the discipline system will they be ready for a college education. While we do use consequences as a tool, our goal in disciplining students is always to help them to understand what the correct behavior is and why that is the correct choice. As discussed above, we strive to understand the choices that students make, and expect those negative choices to become positive ones. The underlying points of our approach to discipline are:

- **Accountability:** Students are trained to be accountable for the choices that they do make. We intentionally limit choices that students are allowed to make through routine and structure. As students earn more privileges and advance through grade levels, they earn more privileges and choices; with those new privileges, the faculty holds them to higher degrees of accountability.
- **Respect:** Every member of the school community is expected to respect one another. This statement is a huge part of our disciplinary practice; simple acts of disrespect lead to bigger ones, so we intentionally and proactively teach positive skills and hold students accountable for each instance of disrespect. Faculty are expected to model respectful, positive interactions with students
- **Team Response:** Faculty are organized in Grade Level Teams with a Grade Level Chair. Each GLT works closely to support individual students academically and behaviorally, holding one another accountable for adhering to academic and behavior plans.
- **Sweating the Small Stuff:** As discussed above, we believe in dealing with issues when they



are still small. We choose to correct students small infractions like being out of line, talking quietly in class, or having a shirt untucked. Addressing these issues establishes the norm in the community that students are expected to adhere to high expectations.

- **Positivity:** Every member of the community is expected to interact with one another in a positive manner. Faculty are expected to set the tone with students by interacting with them respectfully and appropriately; teachers avoid using sarcasm, negative tones, judgments, or singling out students in front of peers. We expect students to reflect this behavior.
- **100% Getting it Right:** At LEAD, the only way we do things is the right way. We practice rituals and routines until we get them right. When students are expected to do things a particular way, and those standards are communicated clearly to them, and they repeat them until they do it right, they have “muscle memory” of how it feels. Teachers expect students to do this, and we commit the time during the day, particularly at the beginning of the year to develop these skills
- **Consistency:** Every teacher and student understands that each member of the community creates the community. Every teacher is expected to hold students, regardless of grade level, to the appropriate expectations. Each teacher holds students to the same expectations in each classroom.
- **Parent & School Collaboration:** From our experience, the most powerful tool for training a student to make the right choice is a unified parent and school approach. In developing responses and intervention, we work closely with parents to gain insight and input from them as to what will work, and work with them to gain their support in our work with a student.

**Supporting Student Safety the LEAD Way:** From our experience, the challenges that our students face come from the challenge of adjusting to the rigor and structure of our school. Given the high goals of the students and school community, some students initially struggle to meet the expectations necessary to succeed at a high level. Some challenges our students display are:

- **Adherence to Routine:** Many students struggle initially to follow set routines and procedures, particularly outside of the classroom. In the hallway, in the cafeteria, and on the playground, students have trouble understanding the need for continued structure.
- **Self-discipline:** As is age appropriate for middle schoolers, many of our students have needed extra support to learn self-discipline, particularly during class times. Students blurt answers out, leave their seat without permission, or don't stay on task. Importantly, many of these behaviors are age appropriate and not necessarily particular to our specific population of students.
- **Stress and Anger Management:** Many of our students live complicated lives. They understandably struggle to deal with balancing the often conflicting expectations of school and home.
- **Doing it the LEAD way:** Students have trouble adopting the view that there is a way to behave at school and a way to behave with friends. Again, this challenge is age appropriate, though some of the externalizing behaviors they engage in can be particularly disruptive, and are therefore challenging to change.

Since we have already encountered and addressed many of the above challenges that we expect to face at future schools, we have designed our discipline system to anticipate and train them away. We view students as developing young citizens who will make mistakes and will learn

best when they develop the skills and techniques to identify those choices, own them, and reflect on why they made the choice. Our system is designed to clearly and repetitively train students what the right choices are, and, when they do make mistakes, give them the opportunity to correct it by working through consequences. While some behaviors are zero tolerance, and some students and families unfortunately ultimately decide that the expectations are too high, we are always committed to working with all students. Some of our behavior tools include:

LEAD views students as developing young citizens who will make mistakes and will learn best when they develop the skills and techniques to identify those choices, own them, and reflect on why they made the choice. Our system is designed to clearly and repetitively train students what the right choices are, and, when they do make mistakes, give them the opportunity to correct it by working through consequences. Some of our behavior tools include:

- **Marks/ Lucre:** All LEAD Public Schools use a token economy called the “Lucre” system where students earn points for making positive choices and contributing to their own and the communities’ advancement. When students make poor choices, they are marked and lose points; marks are given for disrespect to any member of the community (teachers or students are equal in this sense) or failure to comply to a teacher’s requests. Students use Lucre to earn rewards or purchase items at the school store.
- **Detention:** When a student receives a mark, they serve a detention in “Mark Time”. Detention is held during the school day during a free period; importantly, detention is NEVER done during class time as students need more time, not less time, in class.
- **Uniform/ Standard School Attire:** The uniform plays a critical role in establishing routines and structure. New students must earn their shirt by having two consecutive weeks of positive choices and completed assignments. When students earn their shirt, the grade level publicly celebrates the achievement at a community gathering. When students make choices that do not align with the communities’ expectations, often a teacher will ask a student to wear the uniform shirt inside out, not as a way to shame the student, but for the student to publicly demonstrate that they made the wrong choice and are working their way back into the community by making positive choices.
- **RISE (Restoring Individual Student Excellence):** RISE is a program we use to directly teach students community expectations. Students earn RISE by receiving 5 or more Marks in a two-week period or for particular instances that damage the community. While on RISE, students must meet particular behavioral expectations that are designed for them to practice routines. RISE students lose certain privileges, and spend free time in study halls. Students receive feedback from teachers each period of the day through a behavior tracker; when they complete their tracker, students write a letter to their teachers and their class outlining why they earned RISE, what they learned while on it, and how they will avoid it in the future.
- **Attendance/Tardies:** Students cannot be part of the school community if they are not present. We hold high standards for attendance and will work with parents to ensure that their child is present every day.
- **Professional Development:** We release early every Wednesday to hold faculty professional development sessions. Several sessions specifically focus on working with difficult students and helping to train all students to make the right choices. Strategies include establishing and maintaining consistent expectations for students and using the Language of Leadership to speak to students. Through our Grade Level Teams, we practice particular protocols and techniques for developing plans for working with students’

academic and behavioral challenges.

- **Expulsion:** As required under charter law, students will be expelled from school for infractions that meet the MNPS zero tolerance qualifications
- **Suspension:** Students are rarely suspended; instead, we implement our RISE program as a consequence rather than wasting time out of the classroom. On the rare occasions when students are suspended out of school, it is for behaviors that disrupt the safety of the school community. When students are disruptive in class and fail to respond to teacher corrections, they may be sent to the office to meet with an administrator, call their parents to tell them what they have done, or take time out before going to the next class.
- **Honor Code:** As an academic community, honesty is fundamental to our success. Cheating is not accepted by the community and those who do cheat are responsible for making amends to their peers and teachers. The consequence for cheating the first time is community service at the end of the day or before school; if students have hurt the community with their dishonesty, they commit to helping the school improve in other ways.
- **Reflection/ Closing the Loop:** When teachers assign students consequences, they are expected to follow up with that student. If the end of a conversation is merely a consequence without further conversation, the student understands the consequence as an end, not a tool for them to make the right choice. Closing the loop also holds the student accountable after some time has passed, helping them to develop reflection skills necessary for success in college and beyond.

## Parent/Community Involvement

1. Describe how you will engage parents and community members from the time that the school is approved through opening.
2. How will you inform parents and the community about the school's development?
3. Describe how you will engage parents in the life of each school once it is in operation. How will the schools build family-school partnerships to strengthen support for learning and encourage parental involvement? Describe any commitments or volunteer activities the school will seek or offer to or require of parents.
4. What community resources will be available to students and parents? Describe key partnerships that you have developed for existing schools with community organizations, businesses, or other educational institutions. Which of these types of partnerships do you intend to replicate at ASD schools?
5. Describe any specific evidence of community partner support established from any identified community partners in your target locations. Provide, as **Attachment 9**, evidence of support from community partners, which may include letters of intent/commitment, memoranda of understanding, and/or contracts, and should specify the resources to be committed or contributed from the partner, as applicable.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

Our Board, staff, supporters, and community members are excited by the unique opportunity that school transformations offer to scale up our success in new schools. Transforming a failing school will not only serve as a beacon for educational opportunity within the community by creating a culture of unwavering belief in all students' potential, its success will have a far-reaching effect on the entire Nashville community by graduating students who are truly prepared for the rigorous high school experience.

Educating our youth is a responsibility that must be shared by the community as a whole. Our underlying philosophy is based on the belief that all students can learn and do learn when they feel part of a community. To this end, our vision encourages parents and community leaders to partner with faculty to create an atmosphere where all students' needs are being met, and community partnerships are integral to the schools' success.

Understanding the unique nature of the collaboration required between LEAD public schools, the existing faculty and staff, the community, MNPS, the ASD, and the Nashville community, LEAD will work together to identify synergies among each school's parent programs, and synchronize common activities, classes and events. While each LEAD school will develop a separate plan for its family and community members, the LEAD collaborative will be able to leverage common resources to provide services to parents. Among the resources and activities at the new campus may include:

1. Creation of a parent resource center for use by all of the schools' parents. It will be a place for parents and communities to hold meetings, classes and workshops.
2. The collaborative will hold several "town hall type" meetings annually to engage community in the performance of the new LEAD Public School;
3. Create and deliver classes of interest to parents, community (i.e., ELL and technology) in alignment with local institutions;
4. Work with outside organizations to create common on-campus parent orientation, parent training classes, and joint professional development of administrators, teachers and parent leaders where deemed appropriate.

As with all LEAD public schools, new schools will be represented by an advisory board that will include parents, community members, and students. Parents and community members will be represented on committees and boards and will be included in ongoing assessments, surveys, and interviews on campus issues including safety, quality of learning and teaching, inclusiveness, etc.

LEAD Public School's underlying philosophy is based on the belief that all students can learn and do learn when they feel part of a community. Students are more likely to experience success when their home cultures are valued. To this end, our vision encourages parents and community leaders to partner with faculty to create an atmosphere where all students' needs are met and community partnerships are integral to the school's success. Below are the organizational structures already in place to ensure that we are taking a holistic approach to preparing our students for college, leadership and life and engaging all community members in the success of our next generation:

- **Family Engagement:** We are committed to integrating parents/guardians into all aspects of their students' education experiences. Parents are required to give at least 35 hours of service annually at all LEAD schools and a wide variety of service opportunities are made available. The primary focus of service is parent support for their child's academic achievement. Therefore parents are encouraged to complete parenting, English, and

computer classes, as well as college and financial aid workshops. Any course work parents take that increases family literacy receives service credit. Parents have many additional opportunities to complete volunteer hours including: assistance in the office, supervision before and after school, at lunch, during fieldtrips and school events, fundraising, and attending parent workshops, meetings, and community events. Parents may also earn volunteer hours for hosting homework and study sessions in their home, regularly checking student homework logs and signing them, and completing parent surveys.

- **Outreach Department:** Because we are committed to engaging the communities surrounding our schools, the LEAD Public Schools NeST will include an Outreach Department. The department will serve as the liaison between school administrators and the community institutions that surround our schools. The department's responsibilities include partnering with churches, community based organizations, schools and government entities to ensure full integration of a school into a community. The Outreach Department will leverage community partnerships to assist in enrollment outreach, keeps the community apprised of the successes and challenges at the school, identifies community leaders and helps to build grassroots organizing capacity at school sites.
- **Family Coordinator:** Every LEAD Public School has an administrative staff that includes the position of "Family Coordinator." This full time position is responsible for being the liaison between the school, students and parents. This role is vital to ensuring that parents are fully integrated into the day to day operations of the school and feel a sense of accountability and connection to the their child's education. The Family Coordinator's responsibilities include: community outreach, organizing parent volunteers, interacting with parents at the front office, recruiting new students, giving student tours and organizing workshops for parents and students on life planning and health skills.
- **After School Programs:** Our schools are kept open until at least 5:00 pm daily to provide students with safe, enriching after school programs and to allow community group's use of the facilities. Keeping schools open later accommodates the schedules of working families as they know where their children are until they get off work. It also provides the opportunity to engage community partners in supporting our students and their families. Opportunities at our current campus include specialized and general academic and study skills tutoring, sports, clubs, MentorTennessee, Backfield in Motion, and weekend parent classes.
- **Family Resource Center:** It is out intention to use each new facility to host a Family Resource Center that will provide family support, training, and resources. The center will be available to parents and community members beyond normal school hours and will offer classes at off hours for parents who have conflicts.
- **Regular Communication:** Every Tuesday the school sends out an all call to every parent at the school, covering upcoming events and opportunities at the school. Also, every other Friday, we send home a progress report giving parents a regular snapshot of their students' academic progress throughout the semester. Also, we give parents every teacher's cell phone number and require each teacher to hold "on call" hours every day. During that time, each teacher is expected to be available by phone to answer parent or student questions about work and progress.
- **Student Led Conferences:** Parents and families come to campus at least once per year to attend a meeting with their student. This meeting is run entirely by the students, and is focused on discussing the students' portfolio of work from the year.

- **Family Dinner:** Cameron will host monthly parent dinners where parents, teachers, families, and students can talk, socialize, and build a sense of community beyond the regular school day.
- **Surveys:** During events where parents are on campus, we ask them to fill out surveys to give us feedback on their thoughts on how the school year is progressing and to express any celebrations or concerns they may have.
- **Volunteering:** parents can help the office staff with paper work, organizing, or other projects at the school. They also can chaperone school trips, running sporting events, or helping with class projects. We also have a parent advisory board they can join.
- **Parent Talk:** Parents are invited to attend parent training and support sessions during Saturday School sessions that address such topics as “Proper Discipline Methods”, “Supporting Your Teenager”, “Nutrition, Development, and the Health of Your Children”.

LEAD Public Schools will leverage its existing community partnerships to help the new LEAD schools meet its mission of community engagement. As mentioned in the section above, LEAD has an existing organizational structure that promotes the engagement of families and community partners in the education of all our students. Specifically, it is our intention to work with the community partners already serving the students of the phase-out school and expand these offerings to meet the diverse needs of the students and families we serve. The Outreach Director works with each local community to support the School Director of the school with parent community outreach and education. Community engagement occurs in two primary phases:

WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK.

### **III. PHASE-IN/TAKEOVER EXPERIENCE & CAPACITY**

ASD welcomes charter applicants who wish to provide new opportunities to underserved students by transforming chronically underperforming schools through either a phase-in or takeover approach. Selected applicants must have a clear plan for dramatically improving persistently underperforming school cultures, working effectively with an existing school community, significantly raising student achievement, and meeting the needs of at-risk populations. Phase-in and takeover operators are expected to establish strong partnerships with the school community.

*If you are not applying for a school phase-in or takeover, mark “Not Applicable” and skip to the next section.*

1. Describe any prior experience of your organization in turning around an underperforming school.
2. Describe how your proposed school and educational model will meet the needs of a student population that is currently attending a chronically low-performing school. How will your proposed model ensure your school significantly raises student achievement?
3. Describe your plans for dramatically reversing students’ previous experience by building a positive, inclusive, and high-performing school culture.
4. Describe how your proposed school will provide extensive and intensive programming to ensure students have equitable access to quality support services.
5. In the case of a takeover application, describe your plan for successfully recruiting, transitioning, and retaining students who are in the school being replaced or who would be going to the school that is being replaced. What specifically would you do to engage parent and community support?
6. New charter schools in the Achievement School District may only serve students geographically zoned to attend ASD schools. How will your school successfully implement the school model within this enrollment limitation?
7. Describe your community engagement plan for the year prior to opening the school.
8. Describe your plan to work with the existing school(s) during the transition.

**TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.**

Transforming chronically under-performing middle schools and building the high school grades on top of the transformation middle school presents the greatest opportunity for significant, enduring change for the students and requires an organization willing to partner with the ASD, MNPS, the schools’ existing staff, students, and families, and community members and potential partners to find the right solutions. Cameron College Prep, the state’s only charter transformation, is in its second year and is operating with positive reviews from parents, the

district, and community members. Due to its status as a failing school families have been opting out of Cameron in growing numbers over the last five years, but that has reversed with LEAD's involvement. An early indication of the success of the Cameron transformation is the 20% increase in 5<sup>th</sup> grade enrollment, an obvious community response to the promise of a high performing, alternatively managed neighborhood school. Due to our success in working with the District in sharing space and executing the first two years of the Cameron transformation, we believe that we have a proven educational model and the organizational strength to implement our Phase-In conversion model in other communities. The Phase-In approach is a key element in our transformation model and helps us deliver a strong culture of high expectations that drives the development of consistent and effective learning communities across all LEAD campuses.

LEAD Public Schools continues to learn and refine our model, and we have benefited greatly from significant financial support from foundations and individuals that we have translated into significant increases in our organizational capacity. Below is a brief review of some of the issues we have encountered and descriptions of how we have managed them:

***Proven ability to manage all levers for school management, including staff and teachers, educational program, and student and community engagement within an integrated system***

- A transformation school is a new start. Everything—administrators, teachers, staff, programs, systems and structures, relationships with parents and community – must be newly put in place over the course of a short time period. Our proposal is based on our experience starting Nashville's most successful public charter school and our partnerships with proven transformation school operators. Our plan for effectively launching additional multi-year phase-in transformation schools is based on our ability to start LEAD Academy Middle and High School and Cameron College Prep in a difficult political environment and create three thriving schools embraced by the community, supported by its students and families, and owned and operated by its staff.
- Our team combines professional expertise, dedication, and a deep respect and concern for the children and families in the schools we serve. We have a passion for the work of reform to help the children of Nashville who have been left the farthest behind. We believe that all children can learn and we are committed to closing the achievement gap as rapidly as possible through the aggressive intervention and sustained effort of a multi-year phase-in transformation. This shared sense of mission and purpose has allowed us to build the relationships necessary to support high achievement at school and the welcoming, supportive environment parents and community members want in their school.
- Our education plan, developed through our partnerships with some of the highest-performing charter and teaching organizations in the country including, YES Prep Schools, Big Picture Learning, Uncommon Schools, Mastery Charter Schools, Green Dot schools, Expeditionary Learning, Teach for America, and Mass Insight Education & Research Institute, our college-preparatory curriculum and instructional program has been carefully tailored to the needs of high-poverty students and the special challenges of building a culture of high achievement and expectations.

***Proven ability to cultivate a leadership team that is aligned with the school and organizational mission***

- The opportunity to participate in building on our work at Cameron and LEAD Academy Middle and High School will be exciting and will attract strong candidates, a number of whom will have training and/or prior experience in the LEAD network. During the



planning period and beyond, our new School Director will receive day-to-day guidance, coaching, and direction from the most senior and experienced members of LEAD's staff while also receiving training with some of the highest-performing charter and turn-around operators in the country including, YES Prep Schools, Big Picture, Mastery, Uncommon Schools, and Green Dot schools. Recruiting and training a high-performing staff is one of the biggest challenges of the phase-in transformation school model because quality teachers for high-need urban schools are always in short supply. LEAD has demonstrated success in recruiting and developing teachers and school leaders capable of serving the needs of high-poverty student populations in Nashville's public schools since we were founded in 2006. Our partnerships with national teaching and school leadership organizations such as Teach for America and New Leaders for New Schools demonstrate our ability to recruit a highly-qualified and diverse staff.

- LPS will surround the newly appointed School Director with a handful of extremely seasoned educators, all former principals. These Leadership Coaches and other very senior LPS staff integrate school planning with professional development for the School Director.

***Awareness of challenges around the institution of new school culture and proven success in this endeavor***

- We “sweat the details” to make sure that the opportunity to re-set a school's culture and climate is not missed. To be prepared to focus and accelerate their learning, students need to learn “how to do school,” and to be held to high expectations for behavior that foster a safe and orderly environment. Our ability to build and maintain an incredibly tight, student-focused culture comes from sweating the small stuff. No detail, including the preparation of this proposal and designing the unique educational plan included, is too small for our staff.

***Exceptional development of data management skills and strategic planning processes***

- LEAD has a solid and rapidly advancing capability to gather, report, and reflect on data at all levels of the organization, from the Board of Directors to individual classroom teachers. We use data at the organizational level to set goals and hold ourselves accountable, and our teachers use it to differentiate instructions and to quickly spot the need to re-teach students so they do not fall behind.

***Partnerships with social service providers to support student population likely to be found in a Turnaround school***

- In our four years, we have proven that we don't wait for families, the community, and potential partners to come to us. We take the initiative, promptly, to partner with the community, social service providers, police, shopkeepers, aldermen, pastors, arts and athletic organizations – everyone we can possibly convince to join in the vital work of making their children's school effective. Based on our initial community outreach efforts, there is an obvious need for increased community involvement and engagement.
- Even before submitting this application, our team has started engaging the community. We have reached out to parents, community leaders, elected officials, local clergymen, etc. and met them personally to listen, learn, and include their voices in this proposal. These relationships, while still developing, will support our Year 1 review and implementation planning and execution.

***Partnerships to secure added funding resources to cover expected gaps in the planning year and first three years of operation.***

- LEAD Public Schools benefit from a varied portfolio of extra resources assembled by the our back-office Support Center: whether its neighborhood organizations who have brought food and volunteers to prominent foundations who have donated millions to support our model, LEAD has developed important friendships. Since LEAD was founded in 2006, we have raised over \$2 million from sources other than MNPS (foundations, individuals, and government; includes funds pledged through 2011). Many of our partners, especially Universities and foundations, also regularly provide guidance and insight that help us perform better.

Based on the above points, we are confident in proposing to partner with the ASD to transform multiple chronically failing school into LEAD Public Schools following the multi-year phase-in transition.

**2. Describe how your proposed school and educational model will meet the needs of a student population that is currently attending a chronically low-performing school. How will your proposed model ensure your school significantly raises student achievement?**

*See earlier sections for a thorough review of our proposed school and educational model.*

**3. Describe your plans for dramatically reversing students' previous experience by building a positive, inclusive, and high-performing school culture.**

*Please see earlier sections, especially Student Culture and Discipline Policy.*

**4. Describe how your proposed school will provide extensive and intensive programming to ensure students have equitable access to quality support services.**

*See earlier sections, especially the School Design, Supporting Special Needs/At-Risk, Instruction, and Supplemental Programming.*

**5. In the case of a takeover application, describe your plan for successfully recruiting, transitioning, and retaining students who are in the school being replaced or who would be going to the school that is being replaced. What specifically would you do to engage parent and community support?**

*Not applicable. LEAD is applying for phase-in conversion schools*

**6. New charter schools in the Achievement School District may only serve students geographically zoned to attend ASD schools. How will your school successfully implement the school model within this enrollment limitation?**

*Not applicable since LEAD is applying for phase-in transformation schools. However, LEAD Public Schools is open to discussing with the Achievement School District a multi-pronged strategy of combining a phase-in school with additional charter schools to support the successful transformation of a consistently low-performing school(s).*

**7. Describe your community engagement plan for the year prior to opening the school.**

*See earlier Parental Involvement Section*

**8. Describe your plan to work with the existing school(s) during the transition:** Based on our experience at Cameron, we are proposing a Transformation Partnership Committee to be comprised of a representative from the ASD, a representative from LEAD Public Schools, the LEAD School Director and the Principal from the MNPS/ASD Phase-Out school.

During the transition to charter management of the school(s), LEAD Public Schools proposes that we recreate the innovative leadership structure that is supporting the successful transformation of Cameron Middle School into Cameron College Prep. Specifically, the structure we have found successful ensures both clear lines of responsibility and close collaboration and burden sharing in the mission of whole school improvement and sustainable institution building.

The ASD, while responsible for the phase-out schools, will employ a principal who will be hired for a three-year appointment. The ASD principal will retain all managerial and evaluative oversight of the non-charter employees teaching in the building.

LPS commits to conducting a national search for a school leader to manage the LEAD school responsibilities and employees at the phase-in school. As LEAD management of employees expands, the LEAD principal will assume managerial oversight all school employees. To help bridge the conversion timeline, a Transformation Partnership Coordinator will manage any School Improvement grants, oversee the school's improvement planning processes, and facilitate collaboration, division of responsibility, and joint operations undertaken by the two school leaders. Together, the TP Coordinator, the LPS principal, and the ASD principal will assume responsibility for coordination and collaboration so that all responsibilities are met and clearly communicated to stakeholders. The singular purpose of this unique leadership structure is to promote whole school improvement that is dramatic and rapid while simultaneously building the capacity for long term sustainability. The unique leadership structure will offer opportunities for significant and meaningful joint professional development and training of the leaders as well as new synergies not previously recognized in school transformation efforts.

WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK.

#### IV. REPLICATION PLAN & CAPACITY

Provide the following information about the organization’s growth plan and capacity to carry out that plan with quality and integrity.

**Note:** The term “organization” applies to any applicant or partnership among groups applying to replicate a school model in Tennessee. Thus, it may include an existing school or group of schools proposing to replicate; an existing school network or CMO applying directly for a charter; a governing board proposing to contract with a CMO or other education service provider (ESP); or other entities and arrangements. *In the case of an applicant proposing to contract with a service provider, applicants should provide requested information for both entities if applicable.*

#### Network Vision, Growth Plan & Capacity

1. Describe the organization’s strategic vision, desired impact, and five-year growth plan for developing new schools in Tennessee and other states, if applicable. Include: years of opening; number and types of schools; all currently targeted markets/communities and criteria for selecting them; projected numbers of students; and measurable impact on student achievement.
2. Provide, as **Attachment 10**, the organization’s annual report for the last two years and any current business plan for the organization.
3. Summarize the organization’s capacity to support and ensure the quality and long-term success of the new schools proposed. If the organization’s existing portfolio or growth plan includes schools in other states, explain how Tennessee fits into the larger growth plan and how the organization will support and ensure quality in the schools planned for Tennessee. Outline specific tasks and timelines for building or deploying organizational capacity to support the proposed schools.
4. Provide evidence of organizational capacity to open and operate schools successfully in accordance with the growth plan. Explain results of past replication efforts and lessons learned – including particular challenges or troubles encountered, how you have addressed them, and how you will avoid or minimize such challenges for the proposed schools.
5. What are the greatest anticipated risks and challenges to achieving the organization’s desired outcomes in Tennessee over the next 5 years? How will the organization meet these challenges and mitigate risks?

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

It is an unprecedented time to undertake a courageous transformation of how we operate schools in Nashville. For more of Nashville’s students, teachers, and communities to realize the benefits of full-scale, system-wide reform, it is imperative that not only new but existing schools are strengthened by the results and leadership of proven schools, namely schools like LEAD Academy Middle and High School and the State’s first conversion, Cameron College Prep, that

are managed with the will, backing, and plan to play an active role in leading the necessary change.

LEAD Public Schools currently operates three schools in Nashville serving 640 students in grades 5-10. LEAD has also taken on the ambitious challenge of undertaking the state's first charter conversion at Cameron Middle School. Due to the success of our first schools and the need for more high-performing schools in Nashville, LEAD has developed a plan to operate as an independent non-profit charter management organization and create a minimum of 5 high performing, small public 5<sup>th</sup>-12<sup>th</sup> grade LEAD Public Schools in Nashville that will, by 2020, provide seats for 4,705 students at full-growth and annually graduate at least 500 low-income college-ready graduates.

LEAD Public Schools will achieve this vision by integrating modern management and effective educational practices. All LEAD schools share the mission of graduating 100% of its students and sending 100% to a 4-year college/university and will implement the uniquely designed LEAD model, which has been designed to instill democratic habits at an early age, develop them through the middle school years, and refine them at the high school level. Our model includes small total student bodies, individualized attention, college-preparatory academic curriculum, creative and engaging project-based learning service-learning opportunities, a unique Responsible Living Program, and a 8-year college counseling and preparation program. At the same time, LEAD Public Schools will continue to partner with community organizations to engage positive programs needed to address our community's challenges. Ultimately, by combining rigorous academics with a spirit of civic duty and responsibility, LEAD students will return to the community as civic-minded intellectuals armed with a college degree and a desire to impact positive social change.

Unlike other charter organizations, our growth and success is built on partnering with MNPS and the newly created ASD to start and operate a cluster of turn-around public charters under the direct control of LPS. By following this growth plan, we can prompt system-wide change and meet the growing needs of Nashville's most at-risk students and communities. Additionally, by operating a high-performing network of schools, we can better support the curriculum design, instructional support, financial oversight, and back office resources that great schools require for success. Most importantly, by growing LEAD can raise the general expectation that quality schools are possible for every child.

LEAD is poised to move forward with its far-reaching turn-around strategy. We are excited about the first step — developing and refining the business plan which outlines our plans for growth—and our plan to take-over more chronically low-performing middle schools one grade per year. The current LEAD organization is uniquely positioned to continue opening and operating high-performing charter schools in Nashville. First, LEAD has assembled a capable leadership team that has a clear vision and experience in launching and managing schools, as well as critical operational and finance expertise. Second, it is an unprecedented time for reform in Nashville. The Mayor, School Board, Superintendent, and the philanthropic community are aligned behind reform, making the launching of a CMO model timely and necessary. Third, the CEO and board of directors of LEAD Public Schools are well known within the Nashville community. Finally, LEAD's local presence, track record, and credibility in Nashville and the education reform movement are invaluable to establishing and maintaining critical relationships with the school district and local communities.

Ultimately, by ensuring that LEAD graduates have the training, skills and attitudes to succeed in rigorous high schools and go on to college, we will dramatically change the economic and

social futures for these young people and, over time, significantly increase college graduation rates for low-income students citywide. At this scale, by serving as a “proof point” for urban school success, we believe we will have an impact that far exceeds our actual student enrollment.

**Risks and Success Factors:** There are a number of external and internal risks as well as success factors that could have an impact on the ability and timing for LEAD Public Schools to accomplish its goals:

**Risk Factors:**

1. **Facilities:** A significant timing risk is the organization’s ability to find facilities for its schools that meet both physical space requirements and cost constraints. Other charter school operators may also compete for viable sites. The ASD might not be able to deliver facilities on a usable timeline for our phase-in approach to work. MNPS might block us from occupying the conversion facility in a workable timeline. These potential facility risks may impair the organization’s ability to open schools within the planned timeframe. The ability to get affordable financing terms is an additional financial risk. Future possibilities could be to explore the viability of floating a bond measure specifically to finance 10 Nashville charter school facilities. In addition, as other charter operators open, LEAD is open to exploring the option of co-locating schools from different charters/networks to open up additional options (i.e. K-5 run by one network and 5-12 by LEAD).
2. **Charter School Legislation and Funding:** Changes in charter school legislation, regulations, and funding impact the flexibility of the organization to operate its schools in a manner that it deems most effective. Reduction of funding or restricting certain funds for specific uses may encumber the organization in allocating resources to the areas of most need. Additional regulations may impact the amount of management time spent on compliance. Failure to fully fund BEP revenue or for the District to pass through funds can impact the amount of cash needed to cover cash flow if funds are delayed. Changes in the charter school authorization process can impact timing of when schools can open and the amount of work needed to properly submit charter applications to the authorizing agencies. Legislation, regulation, and funding changes often correspond with the positive or negative perceptions of the performance of charter schools. High profile charter school failures by other providers can cause a cascade of additional regulations.
3. **Operational Efficiency, Scalability, Timing:** The organization must ramp up to provide support for existing schools as they continue to scale-up to full capacity, and to support the launch rate of an average of 1 new schools per year through 2016-17. There is risk in the organization’s ability to hire the right people in time, obtaining the right strategic partners, acquiring the right amount of funding in time, and organizing its operations to be efficient. Wrong timing and inefficiency will result in additional costs and potential reduced quality of operations.
4. **School Staff and Student Recruitment:** Each school must have the right mix of staff, both in their areas of expertise and compensation scale, in order for the school to be financially self-sustaining. In addition, the average daily attendance and social-economic background mix of students must be maintained in order for the school to be solvent at capacity.
5. **Stability of Relationship with MNPS and ASD:** The ability of the organization to open and operate schools on time and within the projected budget is dependent on a positive relationship with Metro Nashville Public School, its board of education and the ASD. A

timing and financial risk is created if these relationships cause delays in the charter authorization process or there is a lack of cooperation. Likewise, there is a significant financial and operational risk if the organization's charter schools develop employee agreements that limit flexibility in hiring and terminating as well as choosing an appropriate salary scale that fits into the school budget.

**Success Factors:**

1. **Continued Demand for Schools:** The long-term opportunity is that the organization can continue to build even more schools than even specified in the business plan, due to the poor performance of existing Nashville schools and the projected long-term pro-charter environment in Nashville. The efforts of major national foundations including the Bill Melinda Gates Foundation, Walton Foundation and the Broad Foundation to support the development of new small schools have fueled the popularity and demand for these types of schools. The Race to the Top competition and new, friendlier charter environment supports charter schools as a viable means to provide quality choices to parents. In addition, the published successes of improved performance of a number of these new small schools establishes the credibility of this method as a viable way toward education reform and improved performance of students.
2. **Finding the Right Facilities On-time:** Identifying and having the right financial vehicles to obtain school facilities sites is essential.
3. **Building the Right Team:** LEAD has the advantage of an experienced senior management team and board of directors. LEAD has a good start, but as the organization scales up, finding and adding the right people with the right experience and skills is critical.
4. **Leveraging Credibility & Experience:** The organization can leverage the credibility of its management team, board of directors and credibility in significant education reform efforts to harness the ongoing political and resources support it needs to get the job done. The relationships the school, Board and CEO and President/COO have with the Metro Nashville Schools and ASD, the business community, and community groups can be leveraged strategically.
5. **Collaboration with Strategic Partners:** Launching and operating schools is a complex business. There are significant opportunities to partner with other quality school networks and service providers so that the organization can focus on the things that no one else can do as well— and so that school staff can focus on educating kids.
6. **Keeping the Organization Focused:** LEAD is entering a new phase of its existence, shifting to an operational execution phase of opening and running schools. As it grows in this next phase, the challenge and success factor is to keep the organization focused in both its priorities and allocation of resources to the tasks needed for this next phase as it scales up.
7. **Consistent Revenue Generation:** LEAD must keep its seats filled and with a student population that reflects the diversity of the local community to maximize revenue. A future potential opportunity exists for the organization to provide its charter school support services to other non-affiliated charter schools as a for-fee service. The organization will evaluate this option for specific services once it is determined that the delivery of the service has reached a particular level of efficiency and predictability.

## Network Management

1. Identify the organization's leadership team and their specific roles and responsibilities.
2. Explain any shared or centralized support services the network organization will provide to schools. Describe the structure, the services to be provided, the cost of those services, how costs will be allocated between or among schools, and specific service goals. How does the organization know whether it is successfully delivering these services? *(In the case of a governing board proposing to contract with a management organization, service goals should be outlined in the term sheet and draft contract to be provided with the charter application.)*

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

The LPS Board of Directors is ultimately responsible for each campus and approves the strategic plan, curriculum strategy, and budget of the entire organization. The Board hires and reviews the CEO and COO who, together, are responsible for overall management of the LPS organization and the results of all schools in the LEAD organization. The Founder/CEO sets the vision, strategic direction, growth plans, and oversees all external relations and fundraising activities, as well as working closely with the President/COO to provide ongoing support to other leadership staff throughout the organization. The President/COO is the primary supervisor for all school-based and functional operations of the organization evaluates the performance of chief officers and is the direct report for School Directors and other leadership staff. **Please refer to Attachment 11 for detail regarding reporting relationships and multi-year organization charts.**

The President/Chief Operating Officer is responsible for all internal operations of the organization and the efficient supply of operation, legal, contracting, and facility services to the schools and is responsible for coordinating all finance and accounting activities at all schools, including the annual audit, facility financing, budget creation and cash management. He is responsible for the creation and implementation of school budgets, including monthly update meetings with School Directors to discuss budget and actual expenditures. In addition, he is responsible for compliance with all state financial reporting for ADA funding and any state or federal grants. The President/COO is responsible for all technology and information systems at the network level and for providing guidance and support to the schools. He is also responsible for integration and data transfer between systems, including third-party outside systems. The President/COO oversees the work of outside IT consultants and other third-party consultants and providers.

The primary responsibility of the Chief Academic Officer will be to provide assistance and support to the schools. The Chief Academic officer is responsible for the academic performance of all schools, supporting and helping evaluate the School Directors' performance, instructional leadership development for schools, research and development, overseeing accountability and reporting requirements for schools. Professional Development for new and continuing School Directors and teachers is the cornerstone of sustaining the culture of high expectations and excellence in instruction and is the responsibility of the Chief Academic Officer who are accountable for establishing university partnerships, planning the annual pre service institute for all LEAD Public Schools and for ongoing support to School Directors with school site professional development. *(Until the Chief Academic Officer is hired, the CEO and*



*President/COO jointly own these duties).*

School Directors are hired and re-hired on an annual basis based on performance and are hired and terminated by the CEO and President/COO. The School Director is fully responsible for the performance of his/her school and is subject to an annual performance review by the Chief Academic Officer and the local advisory board. All School Directors, staff, and teachers will be employees of LPS. Resumes for the Founder and CEO and the President/COO are included in **Attachment 1**. Each School Director operationally will have autonomy and responsibility in the following areas:

- Hiring and termination of all school site personnel. (Note: COO or CEO must ratify Terminations).
- Day-to-day management and operations of the school site including management of personnel, student attendance and discipline, and working with parents.
- School-site budgets to the extent that the budgets comply with all applicable funding regulations and LEAD financial management policy.
- Application of the education model within the parameters of LEAD educational model.
- Selection process and operation of the school site advisory council.

**Management and Administration:** The LPS NeST, the back-office support center, has been designed to integrate modern management and effective educational practices to drive student achievement and support school growth. All LEAD schools share the mission of graduating 100% of its students and sending 100% to a 4-year college/university and will implement the uniquely designed LEAD model.

LPS's Support Center's primary objective is to provide effective governance, training, support and services to the campuses, and our students. The NeST ensures effective implementation of the model not only by providing both instructional and non-instructional support services to each campus, but also by assessing campus performance against quality standards and ensuring each campus is effectively executing the core program elements of the LEAD Model.

LPS strives to maintain a balance between preserving the structural integrity of its program and encouraging the spirit of entrepreneurship that characterizes its most successful leaders. Each LEAD campus is expected to adhere to the core program elements while meeting key annual performance indicators and operating within a fixed budget. In turn, school directors and their teams retain significant autonomy in implementing the core program elements and customizing the programs to the needs of their campus.

In conjunction with campus autonomy, LPS seeks to achieve operational efficiency through the centralization of shared service functions in the support center. By centralizing key functions in the home office, the organization will realize economies of scale and enable the development of professional support functions that would be impractical at the campus level. Each campus will employ a School Director of Operations who will serve as an adjunct member of the operations team, oversee site-specific needs, and coordinate school-based business activities with the home office. While the responsibility and accountability for student achievement results lie at the campus level, the home office will play an important role in coordinating corporate governance functions, external relations and fund development.

**Quality Delivery of Services:** All services delivered to the three campuses have specific business processes defined with clear deliverables and service-level agreements. Performance

against service level agreements is evaluated formally twice per year based on feedback from School Director customers. Success is defined by the ability to deliver within these agreements with a 90% satisfaction rating. Business processes are evaluated routinely for improvement in being customer friendly and accurate. Specific business processes and service level metrics are currently being developed for each service to be delivered.

**Focus on Core Competency:** The primary role of the LPS NeST is to establish the framework and model for the two campuses in the Nashville area. Specialty tasks such as real estate, public relations, and School Director training are better performed with the assistance of organizations and individuals that perform these tasks routinely as part of the specialty. LEAD, however, is completely responsible and accountable for the quality delivery of services whether they are outsourced or not. Therefore, LEAD is responsible for defining the required business processes and service levels as a precondition for outsource service providers. The cost of internal and outsource services is evaluated at least yearly whether to outsource or to bring these services in-house.

**Keeping the Organization Lean, Agile, Scalable:** At the school level, each LEAD campus will have very little administrative overhead. The CEO, Chief Academic Officer, President/Chief Operating Officer, and all directors are intentionally not just overseers but also hands-on managers. There are several major scaling points for the organization. First, many operational functions—such as accounting, payroll, food service, and legal—are outsourced because outsourcers have demonstrated a much better capacity to scale to volume within their specialty. All directors and officers work together as a team to support new and continuing schools. As the organization adds the additional campus, new directors will be added. However, the organization is designed to be a flat collaborative team of self-directed leaders who all work directly with the CEO without bureaucratic layers of reporting levels.

**Reviews of Administrative Operations:** The Board of Directors and the NeST regularly review operations and performance at all campuses, functional areas of the Home Office, and may from time to time conduct internal audits of various functions. School Director evaluations are a key element in annual reviews and/or internal audits as they relate directly to achieving the mission of the school and the administrative performance of the school. As all school employees are “at-will” employees, favorable reviews of operations and documented performance toward achieving the mission directly affect the School Director’s annual evaluation and support a strong performance management approach implemented in all LEAD Public Schools.

**Reviews of Program Operations:** The NeST and the Board of Directors review student and school performance annually based on TCAP and Stanford-10 or NWEA results and other measures noted below. The LPS Board receives updates at every board meeting on many of these key measures of program operations. Additionally, the Board of Directors, through direct observations and input from various school communities, reviews executive management and administrative practices annually. LEAD will provide the ASD annually with a complete performance report that will include the following elements:

- Data demonstrating student progress towards the goals and outcomes specified in earlier sections of this application based on the assessment tools and techniques set forth in those sections. To the extent that it is feasible to do so without compromising student confidentiality rights, this data will be displayed on both a school-wide basis and disaggregated by appropriate racial and/or ethnic categories.
- A summary of significant policies or decisions established by LEAD's Board of Directors.

- Data indicating the level of parental involvement with LEAD schools, as well as the results of any surveys of parental and student satisfaction.
- Identification of the faculty and staff employed by each LEAD Public School and a description of their qualifications and achievements.
- Data demonstrating LEAD’s success in serving a racially and ethnically diverse student population.
- A summary of LEAD’s admission practices and experience, including the number of students enrolled, the number on waiting lists, and the number expelled or suspended.
- An analysis of the resolution of any disputes or complaints.

**Successful delivery of services:** Each year in the spring LEAD initiates its annual planning cycle and each functional area of the back office, each school, and the board of directors develop annual plans with goals and agreed upon metrics for assessment. These plans are reviewed quarterly and in the case of the schools on a 9-week cycle. Supporting this annual planning work is the use of dashboards and regular reporting functions to communicate areas of success, progress, and if necessary, a change in approach. See below for an excerpt of the annual plan goals for LEAD Academy High School.

	Goal	Assessment Metric	Resources
<b>Enrollment</b>	<p>Total enrollment for the year will be 150 students in grades 9 and 10.</p> <p>LEAD Academy High will achieve a persistence rate of &gt;90% for both 9<sup>th</sup> grade and 10<sup>th</sup> grade.</p>	<p>Enrollment is calculated as weighted average enrollment during the entire year.</p> <p>Persistence percentage is calculated as the number of students ending the year with LEAD who were also counted on the August 20<sup>th</sup> count day.</p>	<p>Exit data</p> <p>Chancery system</p> <p>Enrollment dashboard</p>
<b>Student Performance</b>	<p>We will maintain and improve the academic performance of our students as measured by EOC, attendance, GPAs, and suspension data.</p>	<p>9<sup>th</sup> and 10<sup>th</sup> grade EOC scores exceed the scores of every MNPS school with &gt;75% poverty.</p> <p>85% of students have GPAs of 2.0 or greater.</p> <p>School-wide average daily attendance averages 96%.</p> <p>Total suspensions will be reported via Chancery and compared to prior year.</p>	<p>TCAP/EOC scores from State. Comparative analysis of scores in similar schools and geographies</p> <p>On time report card data from teachers</p> <p>Timely and accurate daily attendance and parent contact system for absences</p> <p>Consistent implementation of RISE and other behavioral support methods</p>

3. Using the table below, define school- and organization-level decision-making authority as it relates to key functions, including curriculum, professional development, culture, staffing, etc.

<b>Function</b>	<b>Network/Management Organization Decision-Making</b>	<b>School Decision-Making</b>
Performance Goals	Functional directors with CEO/COO approval.	School Directors with CEO/COO approval.
Curriculum	CAO with oversight from CEO/COO.	School Director implements and is able to innovate within the LEAD Model as long as major design elements are met
Professional Development	Instructional PD overseen by CAO.	Site based PD provided by School Directors, Curriculum Directors, and outside professionals.
Data Management and Interim Assessments	CAO selects assessment tools with School Director input.	School Directors implement and provide local data driven instructional support.
Promotion Criteria	CAO responsible for consistent implementation across schools.	School Director decision with CAO approval.
Culture	Surveys, observations, and peer reviews assess Culture, Look and Feel, and College Focus of each campus	School Directors responsible for maintaining the LEAD Culture, Look and Feel, and College Focus.
Budgeting, Finance, and Accounting	COO/CFO with oversight with support from Finance Committee.	School Directors are accountable to meet agreed upon staffing and instructional cost targets.
Student Recruitment	COO works with School Directors to set goals.	School Directors have authority to enroll additional students beyond the goal at their discretion.
School Staff Recruitment and Hiring	Staffing levels agreed upon annually with COO/CAO.	School Directors make hiring decisions for all site-based staff.
H/R Services (payroll, benefits, etc)	COO/CFO ensure services are provided to all sites.	School Directors responsible for accurate staff attendance reporting.
Development	CEO and Dir. of External Relations work with COO to set goals.	Centralized function. Small site-based initiatives as discretion of School Directors (bake sale, for ex.)
Community Relations	Managed centrally.	Provide support and staffing if necessary.
I/T	Managed centrally.	Responsible for safety/security of equipment on daily basis.
Facilities Management	Managed centrally.	Responsible for safe daily use and timely reporting of concerns.

Vendor Management / Procurement	Managed centrally.	School Directors procure instructional support materials within budgeted levels.
Other operational services, if applicable	Transportation, for example, is managed centrally.	School Directors support transportation staff relations with students and parents.

4. Provide, as **Attachment 11**, the following organization charts:

- a) Year 1 network as a whole (including both network management and schools within the network)
- b) Year 3 vision for network as a whole
- c) Year 5 vision for network as a whole
- d) Year 1 school-level organization chart
- e) School-level organization chart at full expansion for 1 school

The organizational charts and accompanying descriptions should clearly delineate the roles and responsibilities of – and lines of authority and reporting among – the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the schools. The school-level organizational charts should likewise present clear lines of authority and reporting within the school. If the governing board would contract with a charter management organization or other education management provider, clearly show the provider's role in the organizational structure of the school. Explain how the relationship between the governing board and school administration will be managed.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

**Please refer to Attachment 11 for multi-year Organization Charts.**

## Governance

### Legal Status and Governing Documents

Describe the legal status of each proposed school, including whether the entity proposing to hold the charter is already incorporated and whether you have obtained federal tax-exempt status. Provide the following in **Attachment 12**: a copy of the Articles of Incorporation for the entity proposing to hold the charter (if filed), as well as proposed board bylaws and policies. As **Attachment 13**, provide a completed and signed Statement of Assurances.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

LEAD Public Schools has been organized as a Tennessee non-profit corporation per the Charter School Act of 2002, and has received a determination letter evidencing it is a 501(c)(3), tax-exempt organization. *Please see Attachment 12 for the Articles of Incorporation, 501(c)(3) determination letter, and the by-laws of LPS.* Each LEAD school is incorporated as a Tennessee Nonprofit LLC and is a member of the consolidated entity, LEAD Public Schools (LPS). LPS is the sole member of each nonprofit LLC. This structure affords LEAD schools several advantages related to being a part of the LEAD Public Schools network of charter schools, including the expertise of its board of directors and the administration of back office functions by its home office staff. The LPS board of directors is the governing body accountable for the fiduciary, legal, compliance, and operational activities of the organization.

## **Governing Board**

1. **Governance Structure and Composition.** Describe the governance structure at both the network and school levels. Will each school/campus have an independent governing board, or will there be a single network-level board governing multiple schools? If there will be a network-level board, how what is the plan for satisfying the statutory requirement that a parent of a child at each school serve on the governing body? Describe the size, current and desired composition for each board.
2. **Roles and Responsibilities.** Describe the primary roles and responsibilities of each governing board, including the relationship between governance and school leadership. List all currently identified board members and their intended roles. Summarize their interests in and qualifications for serving on the board. Explain how the proposed governance structure and composition will help ensure that there will be active and effective representation of key stakeholders.
3. **Board Creation/Transition.** If the Founding Group is not the governing board for the network or for proposed new schools, explain how and when the Founding Group will transition to the formal governing board, and how the Founding Group will support the proposed schools during start-up and in the longer term. In **Attachment 14**, provide a completed and signed Board Member Information Sheet for each proposed Board member.

4. **Pre-Existing Nonprofit Organization.** If this application is being submitted by an existing nonprofit organization or institution *other than* a charter school governing board:

Will the existing nonprofit board govern the proposed schools? If so, what steps will the existing board take to transform its board membership, mission and bylaws to support the charter school expansion/replication plan? If a new board will be formed, describe how and when the new board will be created and what, if anything, its ongoing relationship to the current board will be.

5. **Procedures.** Explain the procedure by which board members have been and will be selected. How will the board fulfill its responsibilities? What will be the planned frequency and focus of meetings? Identify any standing subcommittees the board expects to have. Describe how the school and governing board will comply with Open Meetings and Open Records laws. See T.C.A. §§ 8-44-101 et seq.; 10-7-503, 504. Additional guidance is available from the [Office of Open Records Counsel](#).
6. **Ethics and Conflicts of Interest.** Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as **Attachment 15**, the board's proposed Code of Ethics and Conflict of Interest policy.
7. **Advisory Bodies.** Describe any network- or school-level advisory bodies or councils to be formed, including the roles and duties of that body. Describe the planned composition of the advisory body; the strategy for achieving that composition; the role of parents, students, and teachers (if applicable); and the reporting structure as it relates to the governing board and

leadership.

6. **Board Expansion, Development, Succession.** Explain the plan for increasing the capacity of the governing board. How will the board expand and develop over time? How and on what timeline will new members be recruited and added, and how will vacancies be filled? What kinds of orientation or training will new board members receive, and what kinds of ongoing development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation. If there will be a network-level board, identify any board development requirements relative to the organization's proposed growth and governance needs.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

**Governing Structure and Composition:** The LPS Board is currently composed of a minimum of five directors and a maximum of fifteen directors, with each director serving a three-year term. The terms are staggered, to the extent possible, so that there are an equal number of directors' terms expiring each year. Directors who have served two successive three-year terms will not be eligible for re-election until a lapse of at least one year. In addition to the elected Directors, each of the Chief Executive Officer and Chief Operating Officer serve as *ex officio* members of the Board. There are four Standing Committees of the LPS Board, each comprised of at least three members, including a Finance and Audit, Executive, Marketing and Development, and Academic Committees.

**Roles and Responsibilities:** The LPS Board of Directors is ultimately responsible for each campus and approves the long-term strategic plan, curriculum strategy, budget, etc. of the entire organization. The Board hires and reviews the CEO and COO. School Directors are at-will employees hired at the discretion of the CEO/COO and have evaluations and compensation adjustments made on an annual basis according to agreed-upon performance expectations. The School Directors, in turn, will be responsible for selecting teachers and staff for their school. All School Directors, staff, and teachers will be employees of LPS. The Finance and Audit Committee of the Board of Directors shall annually oversee the selection of an independent auditor and the completion of an annual audit. This audit will be conducted in accordance with the applicable Generally Accepted Accounting Principles and will verify the accuracy of LEAD's financial statements, including its Balance Sheets, Income Statements, and Cash Flow Statements, attendance and enrollment accounting practices, and review internal controls.

The LPS Board approves the budget for each campus and also the consolidated entity on an annual basis. In accordance with state law, all LEAD schools' fiscal years will run from July 1 through June 30; therefore, budgets will be submitted by June 1 each year.

The Board of Directors serves two core purposes: to hold the Network Support Team accountable for the continued success and healthy management of the schools and to generate support for the schools in the local financial and political communities. The LPS Board as a whole holds the following responsibilities and agrees to:

1. Uphold and preserve the school's mission and values. The mission of LEAD is to cultivate in its students the character and academic skills needed to succeed in rigorous high schools and colleges and to become productive citizens in the world beyond. Each individual board member must fully understand, believe in and support the mission and values of the school. It is the Governing Board's responsibility to fully support the

school's mission and values, and to review the mission statement periodically to ensure that their governance aligns with this mission.

2. Support the CEO and review his or her performance. The board should ensure that the CEO has the professional support s/he needs to further the goals of the school. The CEO, in partnership with the entire board, should decide upon a periodic evaluation of the his/her performance and the performance of all employees.
3. Govern meaningful planning. As stewards of the school, the board must actively participate with the CEO in the organization's long-term planning process and assist in implementing the resulting plan. In creating this plan, the board considers the long-term goals for the following: funding, community image, school programs, legal obligations, financial standing. The board researches these areas and creates a long-term plan for the CEO to employ.
4. Assure adequate resources. One of the board's foremost responsibilities is to assure that there are adequate resources for the school to fulfill its mission. The board and each individual board member works in partnership with the CEO and development staff, if any, to raise funds from the community. Every board member must contribute to the school financially in some measure.
5. Manage resources effectively. The charter school board, in order to remain accountable to the charter authorizer, parents and students, its donors, the public, and, to safeguard its tax-exempt status, must approve the annual budget and ensure that proper financial controls are in place.
6. Monitor the school's academic programs and services. Each year the board works with the CEO to review past school performance and set goals for the organization's academic program and student services.
7. Monitor and ensure compliance with Department of Education regulatory statutes. The board should review school policies and programs to ensure compliance with state and Federal regulations.
8. Enhance the school's public image. LEAD's primary link to the community, including constituents, the public, and the media, is the board. As part of a comprehensive public relations strategy, the board should articulate the school's mission, accomplishments, and goals to the public, while garnering support from important members of the community.
9. Assess its own performance. It is the board's responsibility to ensure that the total organization is effective in achieving its mission and efficient in using its resources. It should begin this annual discussion by evaluating its success as a board. By evaluating its performance in fulfilling its responsibilities, the board can recognize its achievements and reach consensus on which areas need to be improved.

**Board Creation and Transition:**

The Founding Group is already governed by LEAD Public Schools and LPS will continue to govern current and future schools.

**Pre-existing nonprofit organization:** Not Applicable as LPS is an existing non-profit charter school governing board.

**Procedures, Ethics, and Conflicts of Interest:** LEAD Public Schools is a 501c3 nonprofit entity with a self-perpetuating board of directors of between 5 and 15 members. The board



includes a parent of a current student, skilled and experienced business executives, an attorney, a local member of the judiciary, and educational entrepreneurs, among others. As LEAD expands to serve more students it expects the board will grow to include additional parent representatives and under state law is able to incorporate sole member nonprofit LLCs as subsidiaries for each school that it operates. This structure allows us to operate as an efficient consolidated enterprise, while also allowing for individual school boards if necessary. As the CEO and other board members meet people in the business, political, educational and grassroots community, they consider them for their potential to become board members. Through informal discussions, the CEO will first determine if the potential board member fully supports the LEAD philosophy and mission. At the same time, he will question the potential board member to determine if that person possesses any of the desired traits or skills of a Governing Board member. Once the CEO has initiated the formal screening process, he will bring the candidate's name before the LEAD Board of Directors who will have the power to vote the candidate onto the board and extend a formal invitation to sit on the LEAD Board of Directors.

The board meets at least once per academic quarter and once in the summer in compliance with the Tennessee Open Meetings Law, (T.C.A. § 8-44-102, *et. seq.*) to review LEAD's operations, consider and adopt policies and consider requests and concerns from parents, students, and instructors. It will exercise its fiduciary duties with respect to financial oversight, adherence to the school's charter, compliance with applicable state and federal laws, and commitment to LEAD's goals and mission. None of the board members will be compensated for their service.

The Board of Directors and all relevant committees meet regularly to ensure that its fiduciary duty is maintained. At each meeting, the Board will review the following: prior meeting minutes, business items, educational items, subcommittee reports, School Director reports, new business and other items. The Board will also serve as the last resort for issues that arise that cannot be resolved by the active parties. A standing Grievance and Policy Review Committee will review all complaints against instructors, the School Directors, or discipline issues that the LEAD administration and staff cannot handle. The board will legally hold tangible assets of the school and the board is responsible to all interested parties for their good use. The board will also serve to link the school to the community. Board members will be required to sign a conflict of interest form and to avoid matters, which may affect their interests. In compliance with the Charter School Act of 2004, board membership includes a parent representative. The Parent Representative is a full voting member of the LEAD Public Schools Board and sits on the Academic Committee, which has oversight responsibility for the individual schools and their advisory boards. The Parent Representative also is responsible for representing the LEAD Public Schools Board at the advisory council meetings and events. Terms of board members are staggered. Officers include a President, Vice-President, Secretary, and Treasurer. Committees to address other specific areas will also be formed, including a personnel committee, fundraising committee, curriculum committee, and an assessment and accountability committee. ***Please see Attachment 15 for the LEAD Conflict of Interest Policy.***

**Advisory Boards:** LPS utilizes community advisory councils comprised of members of the school and local community to ensure effective pathways of communication to the board exist. Community advisory councils are comprised of parents, staff, and community members and work directly with the campus School Director in support of effective school operations, parent communication, additional community and parental involvement, and identifications of concerns.

**Board Expansion, Development, and Succession:** LEAD nominates members to its governing board based on many criteria, including experience, skill set, diversity, and commitment to the school and its mission. The board meets annually to review its goals and improve its effectiveness as a governing body. The nominating committee evaluates new board members regularly and brings them to the board for discussion and approval.

### **School Management Contracts**

*If applicant does not intend to contract with an education service provider or management organization, mark “Not Applicable” and skip to next section.*

If any proposed school intends to contract with a charter management organization or other education service provider (ESP) for school management, provide the following information (and provide the requested documentation as **Attachment 16**):

- a. A term sheet setting forth the proposed duration of the contract; roles and responsibilities of the school governing board, the school staff, and the service provider; scope of services and resources to be provided by the service provider; performance evaluation measures and mechanisms; detailed explanation of compensation to be paid to the provider; financial controls and oversight; methods of contract oversight and enforcement; investment disclosure; and conditions for renewal and termination of the contract;
- b. A draft of the proposed management contract detailing all of the above terms;
- c. Explanation of the relationship between the school governing board and the service provider, specifying how the governing board will monitor and evaluate the performance of the service provider, the internal controls that will guide the relationship, and how the governing board will ensure fulfillment of performance expectations;
- d. Disclosure and explanation of any existing or potential conflicts of interest between the school governing board and proposed service provider or any affiliated business entities; and
- e. Evidence that the service provider is authorized to do business in Tennessee.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

*Not Applicable*

### **Grievance Process**

Explain the process that schools will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure or practice at the school. Describe the types of corporate or school documents that will be available to parents free of charge and how those will be made available.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

The purpose of our grievance policy is to aid parents in securing at the lowest possible administrative level, prompt and equitable resolution of student or parent complaints. Complaints about school personnel will be investigated fully and fairly. Whenever a complaint is made

directly to the LEAD Board of Directors as a whole or to a Board member as an individual, it will be referred to the Executive Committee for study and possible solution. An employee who is the object of a complaint will be informed promptly and afforded the opportunity to present his or her version of events. The goal of the Grievance Policy is:

- To establish a simple framework for addressing concerns
- To provide for prompt resolution of concerns.
- To ensure that all parties will participate in a cooperative manner to resolve concerns.
- To ensure that most concerns will be handled without resorting to this procedure beyond Step 1.
- To assure that the system has a procedure to receive citizens' concerns in an orderly fashion to achieve the best possible educational program for students.

**A. STEP NO. 1: DIRECT CONVERSATION:** If a parent has a disagreement or misunderstanding with an instructor, the parent should address the concern to the specific instructor directly involved with the circumstances surrounding the concern. The staff member will meet with the parent as soon as possible, but in no case longer than five (5) school days after the instructor has been notified of the concern (subject to change by mutual agreement). The parent should calmly and respectfully request such a meeting both verbally and in writing.

**B. STEP NO. 2: FACT AND POSSIBLE RESOLUTION:** If a parent or the instructor is not satisfied with the outcome of Step No. 1 or the parent/instructor is unwilling to meet independent of an administrator, a meeting with the instructor, appropriate administrator, and parent will be arranged at a mutually convenient time, but in no case more than five school days after the meeting in Step No. 1. This step is to be informal and verbal. No further action will be taken beyond Step No. 2, unless the parent submits in writing a signed and dated statement of facts giving rise to this concern, the name of the accused instructor, and the remedy sought. It is imperative that all parties involved maintain a professional demeanor at all times.

**C. STEP NO. 3: FORMAL PROCESS:** If a parent's concern is not satisfactorily resolved at either the first or second level, the parent should then refer this concern to the Dean of Instruction in writing. At that time another meeting will be arranged at the convenience of the parent and staff member directly concerned, but in no case later than ten (10) school days (subject to change by mutual agreement). The staff member has the right to be at all meetings with or without a representative as he/she so determines. The School Director or his/her designee will supply written dispositions to all parties within five school days. Copies of the disposition will be sent to the Board of Directors. The disposition may also be placed in the instructor's personnel file when deemed appropriate by the School Director. The instructor and parent shall be informed if the letter is to be placed in the personnel file.

**D. STEP NO. 4: EXECUTIVE COMMITTEE:** If either party is still dissatisfied with the outcome of Step No. 3, the problem will be placed on the agenda of the next regularly scheduled Executive Committee of the LEAD School Board. The meeting will be held in executive session with only the members of the Committee and the affected persons present.

**E. STEP NO. 5: EXECUTIVE SESSION:** If either party is still dissatisfied with the outcome of Step No. 4, the problem will be placed on the agenda of the next regularly scheduled Board of Directors meeting. The meeting will be held in executive session with only the Board of Directors members and the affected persons present.

**F. DISPOSITIONS:** Dispositions of all meetings will be rendered in writing within five school days of the meeting with reason(s) stated.

**G. REPEAT CONCERNS:** If a parent believes there has been a repeat of the previous concern, they may go directly to Step No. 3 - "Formal Process."

## Performance Management

ASD will evaluate every charter school's performance annually and for renewal purposes according to a set of academic, financial and organizational performance standards that will be incorporated into the charter agreement. The academic performance standards will consider status, growth and comparative performance based on federal, state, and school-specific measures. The financial performance standards will be based on standard accounting and industry standards for sound financial operation. The organizational performance standards will be based primarily on compliance with legal obligations including fulfillment of the governing board's fiduciary obligations related to sound governance.

Applicants may propose to supplement the ASD's performance standards with school-specific academic or organizational goals.

1. Describe any mission-specific **educational** goals and targets that schools will have. State your goals clearly in terms of the measures or assessments you plan to use. If your network-level and school-level goals and targets will be the same, simply state so.
2. Describe any mission-specific **organizational** goals and targets that schools will have. State your goals clearly in terms of the measures or assessments you plan to use. If your network-level and school-level goals and targets will be the same, simply state so.
3. How will the performance of existing schools inform replication and continued growth decisions?
4. In addition to the mandatory TCAP assessments, identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the school's curriculum, performance goals and state standards.
5. Explain how the organization will measure and evaluate academic progress – of individual students, student cohorts, each school, and the network as a whole – throughout the school year, at the end of each academic year, and for the term of the charter contract. Explain how the organization will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community.
6. Describe the information system the organization will use to manage student performance data. How will the organization track, analyze, and report student data across campuses?
7. Explain the training and support school leaders and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

Measuring success is consistent with the values, goals, and operating principles of the entire LEAD Public Schools organization. We understand that excellence happens through continuous improvement, a value clearly demonstrated in the approach we have taken toward research and refinement, curricular development, and the sharing of best practices.

Through our partnerships, internal capacity, and use of key performance metrics and ongoing development of performance dashboards, we will be able to ensure staff and instructors have the real-time information they need to adapt and personalize instruction. However, since our culture of excellence demands that our students have more than academic skills, staff will also assess student behavior, personal development, and service to our community. When the results come back, the whole school autopsies the results, mining what worked and what didn't so that we can exchange ideas for how to improve all students and then implement the strategies.

To put our beliefs in action and to meet our mission and vision, staff and management have created common performance metrics to provide our teachers, Board of Directors, funders, and the public with a variety of tools that strengthen our operations and reinforce our culture of excellence and continuous improvement. By standardizing an immense amount of information and data in these tools—from achievement, academic progress, operations, management, and school performance—we are able to accurately measure performance, make the right decision at the appropriate time, and get and keep the right people in the right jobs. Each school will be accountable for the following:

- Meeting and exceeding all applicable State and Federal accountability standards for public charter schools including the federal “No Child Left Behind” Act. This includes compliance in administering required Tennessee State standardized testing.
- Meeting and exceeding all applicable State, Federal, and Local laws and regulations including but not limited to legal, finance, accounting, labor, zoning, and building codes.
- Adhering to the non-negotiable principles of the LEAD educational model.
- Meeting or exceeding annual AYP growth targets and expected to annually increase the percentage of students performing at proficient or advanced levels on interim standards-based assessments and on annual TCAP Tests.
- Maintaining a minimum of a 95% annual attendance rate for all grades.
- Ensuring that the student body reflects a mix of ethnic and economic background students at least as diverse as the student body of the local district of MNPS.
- Staffing school with teachers who have the appropriate credentials and demonstrate the ability to engage students in learning.
- Survey results will reflect high employee satisfaction and student/parent satisfaction rating of at least 85% in overall satisfaction.
- Parents are provided the opportunity to participate in a minimum of four Saturday Parent Academy sessions focused on the parent’s role in supporting their children to meet the required commitment for parent participation.
- A portfolio is created and maintained for each individual student.
- Accurate, timely, and complete financial results will be produced monthly along with comparison to budgeted amounts and projected future cashflows.
- Weighted metrics are used to measure progress and are linked to performance incentives and growth.

**ACADEMIC OUTCOME GOALS:** Each LEAD school is part of a network of charter schools

managed by LEAD Public Schools (LPS). LPS plans for all of its schools to be at the forefront of the state in educating at-risk youth. In time we will prove that all students, including those that come from disadvantaged neighborhoods and homes, can compete with the best students in the country when given the appropriate opportunities and environment.

As a college-preparatory network, LEAD Public Schools will analyze data that not only represents students' academic growth, but also captures their progress in college to ensure that our school is meeting the mission of the organization to prepare students for success in a college or university. The data on student matriculation, retention, and college success will be used to evaluate the efficacy of our approach and to make appropriate modifications. To help us reach our goal of graduating 100% of our students, LEAD Public Schools has developed the following academic goals:

1. LEAD students will achieve competitive reading and literacy proficiency at all grade levels resulting in verbal and written fluency, as measured by:
  - Performance in state tests (TCAP, End-of-Course), Performance in PSAT and SAT
  - Individual Student Portfolio, Course grades, Quarterly LEADership Contracts
2. LEAD students will demonstrate their acquisition of the principles and methods of mathematics, computer science and other sciences resulting in increased problem solving, critical thinking, technology and mathematical reasoning skills, as measured by:
  - Performance in state tests (TCAP, End-of-Course), Performance in PSAT and ACT/SAT
  - Individual Student Portfolio, Course grades, Effective application of computers and technology, Quarterly LEADership contracts
3. LEAD students will demonstrate proficiency in the social sciences and will engage in community service opportunities as part of the school curriculum, as measured by:
  - Performance in state tests (TCAP, End-of-Course), Performance in PSAT and ACT/SAT
  - Individual Student Portfolio, Course grades, Quarterly LEADership contracts
4. LEAD students will be prepared to enroll and compete in a higher education environment upon graduation from high school, as measured by:
  - Performance in state tests (TCAP, End-of-Course), Performance in PSAT and ACT/SAT, Course grades
  - Individual Student Portfolio, Performance in AP Examinations, Performance in college-level coursework
  - Performance in internships, institutes, and other academic activities
  - Effective application of computers and technology, Quarterly LEADership contracts, Attendance in school-sponsored college visits
5. LEAD students will develop an appreciation of aesthetics, arts and humanities through active participation in art, music, drama, dance and other forms of expressions across cultures, as evidenced by:
  - Performance in state tests (TCAP), Individual Student Portfolio, Course grades
  - Performance in artistic programming (i.e. drama, band, art shows, etc.)
  - Participation in learning expeditions
  - Quarterly LEADership contracts, Attendance in after-school programs
6. LEAD students will demonstrate a thorough understanding of the importance of physical, emotional, social, and self development, as measured by:
  - Participation in physical education, healthy living program, and extra-curricular

- activities
  - Performance in physical education and healthy living program coursework
  - School attendance rates
  - Rate of teen pregnancy and incidence of ATOD use
  - Annual surveys of student’s career goals and plans
  - Rates of disciplinary violations
  - Community surveys and demographic research
- 7. At-risk, learning disabled, and non-native English speakers will demonstrate improved academic performance in all content areas, as measured by:
  - Performance in state tests (TCAP), Individual Student Portfolio, Course grades
  - Progress in meeting IEP Goals
  - Performance in specialized courses (remedial, ESL, academic mastery, etc.)
  - Parent satisfaction surveys
- 8. LEAD Public Schools has developed mechanisms for engaging in replication strategies and sharing of our mission, performance, and challenges through:
  - Partnerships with local, state, and national schools, districts, and instructors
  - Training programs, Research activities, Publication and dissemination activities
  - Special programs such as conferences, symposia, workshops, and meetings, etc.
  - Partnerships with local, state, and national universities, colleges, and organizations
  - Development of replication materials
- 9. LEAD will measure its ability to prepare and send more students to 4-year colleges/universities by measuring:
  - **Matriculation rates:** LEAD will track how many students have been accepted to at least one four-year college or university, and of that number, how many students begin attending within one calendar year after high school graduation.
  - **Retention rates:** LEAD will measure the percentage of students still enrolled in their original college or university, percentage of students at transfer institutions, and the percent attending community colleges.
  - **Academic achievement:** LEAD analyzes students’ semester grades and grade point averages in order to determine college preparedness and which aspects of the LEAD curriculum or program might be modified in order to ensure more consistent student success in post-secondary work.
  - **Post-secondary graduation rates:** LEAD will measure college graduation rates of all alumni.

**ORGANIZATIONAL GOALS:** At LEAD Public Schools, we expect the best from our staff—from our School Directors to our teachers and our bus drivers. Our hiring process is comprehensive and focuses on three unwavering qualifications: expertise in a chosen field, commitment to serving under-served students, and most importantly, a passionate commitment to doing “Whatever it Takes” for our students to succeed.

LEAD instructors collaborate weekly, are organized into small groups led by an experienced lead instructor, and participate in a peer coaching system; thus, the ability to work effectively in a team environment is just as imperative for our students as it is for our instructors. To model leadership and respect that it is a life-long process required extraordinary personal commitment, all LEAD instructors are given one-year, “at-will” contracts that stipulate that a comprehensive system of evaluations and assessments will be used to evaluate their classroom, cultural, and

community leadership. To successfully meet their expectations all instructors must be:

- **Trained:** All instructors are expected to participate in pre-service training the summer before their first classroom leadership assignment. New teachers are required to successfully complete our “new instructor” training program, which includes additional training days prior to the beginning of each school year.
- **Assessed:** In reviewing performance, evaluators begin with the most basic key performance indicators: Tennessee state and local assessment tools. Next, an assessment matrix is created from the instructor’s performance contracts, a minimum of five in-person peer classroom reviews, and a comprehensive assessment. Finally, conferences are held between the evaluator and the instructor in which all sectors of their year are reviewed, discussed, and evaluated.
- **Committed:** All instructors are expected to participate fully in the life and community of LEAD. Instructors are expected to continue their education and every effort will be made by LEAD Prep and its instructors to support these training opportunities.

Accordingly, we will measure ourselves against the following instructor goals:

- Every instructor will maintain an attendance rate of 95%, including Saturday classes.
- Every instructor will submit provisional lesson plans for each semester. First semester lesson plans will be submitted the Monday before the first day of classes and second semester lesson plans will be submitted prior to the winter holidays.
- Every instructor will participate in a two-week summer program each year.
- Every instructor will score a satisfactory or better on end-of-semester student evaluations.
- Every instructor will complete thirty hours of professional development training each year.
- Every instructor will conduct thirty observation hours inside or outside the school. Off-campus observations are encouraged and require prior approval from the School Director.
- Every instructor’s student performance measures will comprise a significant portion of their evaluation, in accordance with TN State law.

**SCHOOL-SPECIFIC GOALS:** What makes our schools and organization successful will be our culture of excellence. Therefore, instructors, staff, family members, and community members are held to the same high standards as our students, including expecting all to commit to our goals of developing students with the academic skills and strength of character needed to transform our community. To provide our students with the most comprehensive academic, social, and emotional support systems, we have developed a holistic approach to education that includes increased parental involvement, social engagement to better integrate students into the communities in which they live, expeditionary learning programs to stimulate alternative learning styles, community engagement to encourage them to give back to our communities, and, above all else, high expectations which will, in turn, produce observable improvements in our students' social and academic performance. To fulfill our promises to our students, families, and community, LEAD has dedicated itself to the following objectives:

- To promote, maintain and insure the safety, health and well being of every child within our community.
- To develop every child’s self-confidence, self-worth and purpose through a rigorous



leadership development program.

- To promote, maintain and strengthen the family structure.
- To employ, train, and support quality staff and volunteers who express a genuine passion to the principle that every child can flourish in a challenging, dedicated, integrated environment.
- To promote community participation by partnering with every family, child, individual, and organization that commits him/herself to involving themselves in the lives of our students and community.
- To refuse to abandon any child to failure.
- To support every child in our community by providing early and continuing education to every child and their family.
- To search out economically and educationally distressed communities and intentionally develop programs that provide positive environments for all children.

We are committed to the following non-academic goals:

1. LEAD will provide a safe and nurturing student-centered learning environment that focuses on the holistic development of students and their families, as measured by:
  - Number of auxiliary/support services offered and used by students
  - Student and Parent Satisfaction Surveys and Focus Groups
  - Parental engagement
  - Student discipline reports
  - Quantity and quality of school-based services for families, including: health, legal, social work, training, etc.
  - Quantity and quality of extra-curricular programming for students
2. Parents at LEAD will be engaged as partners and will be full participants in all aspects of the school's operations and governance, as measured by:
  - Levels of parent volunteerism
  - Levels of parental participation among paid staff
  - Levels of parental participation in Parent Advisory Board and other committees
  - Quantity and quality of training and adult education programs
3. LEAD will implement efficient and cost-effective administrative and operational practices to ensure that the necessary human and resource infrastructure is in place to address areas such as: personnel, finance, enrollment, facilities, nutrition, etc., as evidenced by:
  - Annual School Operational Plan
  - Monthly reports to the Board and Board Committees
  - Budget vs. Actual reports
  - Relevance and effectiveness of staff orientations, benefits, and training
  - Annual facility inspections
4. LEAD will capitalize on the formation of organizational partnerships as a strategy for maximizing resources, tapping on financial sources, and leveraging public support, as evidenced by:
  - Number of organizational agreements
  - External funding base
  - Service agreements

**Information System:** The mission and vision at LEAD is to provide a rigorous academic program that will prepare each of our students for 100% high school graduation and acceptance by a 4-year college/university. At LEAD, we do not measure student achievement using tests alone. Research finds it is important to consistently identify the gap between actual and desired performance and suggest actions that will successfully close that gap. Assessments at LEAD offer the additional opportunity to analyze a student's strengths and weaknesses and provide enough information for instructors, parents, administrators and "Crew" groups to map out an improvement strategy. This includes differentiating instruction, increased time on task, and the need for individualized help.

The variety of assessments and feedback tools derives from our belief that the best schools monitor and adjust instruction *during* the year, rather than waiting for high-stakes state tests to make summative judgments at the *end* of the year when it's too late to make a change. Therefore, assessment is a key component of LEAD instructional methodology.

At LEAD Public Schools, we have designed our reporting and assessment protocols to create and foster a low-stakes, no-blame climate in which we undertake constant reviews of learning and instruction to ensure the most effective instruction methods are employed so students are learning to their fullest potential. This will allow for instruction to be data driven.

At LEAD Public Schools, we are focused on student learning. Therefore, instructors work collaboratively, both on their campus as well as with instructors at other LEAD campuses during Network Professional Development Days (held once per month) to examine what is working and what is not and find the best way to see that all of our students reach their potential. Consequently, quality assessments need to be employed and the results analyzed to focus instruction. Assessment practices at LEAD drive instruction. Additionally, instructors and students collaborate to develop standards-based criteria for quality work so that students and instructors have consistent and explicit criteria to monitor their progress.

Instructors will use effective assessment practices by employing multiple assessments on a daily, weekly, quarterly and yearly basis. To fulfill state and federal No Child Left Behind (NCLB) requirements, all LEAD students will take the TCAP and End-of-Course tests each spring and the writing assessments in January/February. LEAD Prep Southeast will follow all state regulations and guidelines when administering the TCAP. As a school, our foundational goals begin with students meeting the proficiency requirements detailed in the State of Tennessee No Child Left Behind plan.

**School Leader Training:** A comprehensive professional development program is also in place for administrators, which includes the following:

- **Coaching:** LPS Support Center staff provides individualized coaching sessions for each school site administrator twice a month. These coaching sessions are focused on the supervision of instruction.
- **Key Results:** The LPS Support Center facilitates a Key Results session at one of the schools each month. During these sessions, the School Directors go to the other school for 3 hours. During this time, the host School Director provides a focus question for the session centered on instruction. School Directors walk through classrooms with this focus question in mind and provide the host principal with feedback about this focus question. These sessions help School Directors share ideas with regards to the supervision of instruction and all principals to generate next steps to be taken at their school sites as a result of what they see at the host school.
- **95/5:** We believe that 95% of an administrator's time should be spent at the school site

and 5% should be focused on professional development. 95/5s are monthly, half-day professional development sessions for School Directors and Deans. These sessions, led by the LPS Support Center, focus on the themes that have emerged as the most relevant based on coaching sessions.

## Human Capital

### Network-wide Staffing

Complete the following table indicating your projected staffing needs for the entire network over the next five years. Include full-time staff and contract support that serves the network 50% or more. Please adjust functions and titles as needed to reflect organizational plans.

Year	Year 1	Year 2	Year 3	Year 4	Year 5
Number of middle schools	3	4	5	5	5
Number of high schools	1	1	1	3	4
<b>Total 5-12 schools</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>5</b>
Student enrollment	1030	1785	2385	3055	3506
<b>Management Organization Positions</b>					
Founder/CEO	1	1	1	1	1
President	1	1	1	1	1
Director of Special Projects		1	1	1	1
Exec. Assistant to the CEO & President	1	1	1	1	1
<b>Executive Mgt.</b>	<b>3</b>	<b>4</b>	<b>4</b>	<b>4</b>	<b>4</b>
CAO	1	1	1	1	1
Talent Recruiter – Instructional Staff	1	1	1	1	1
Director of Special Education	1	1	1	1	1
Assistant Dir. of Special Education		1	1	1	2
Clinical Staff	Outsource	Outsource	Outsource	Outsource	Outsource
Director of Data & Assessment	1	1	1	1	1
Director of College Initiatives				1	1
Director of Instructional Coaching		1	1	1	1
<b>Academic Dept.</b>	<b>4</b>	<b>6</b>	<b>6</b>	<b>7</b>	<b>8</b>
Director of External Relations	1	1	1	1	1
Development Director	1	1	1	1	1
Grants Manager	1	1	1	1	1
Annual Fund Coordinator			1	1	1
Outreach Coordinator	1	2	2	2	2
<b>External Affairs, Dev., &amp; Outreach</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>6</b>	<b>6</b>
CFO		1	1	1	1

Controller	Outsource	Outsource	Outsource	Outsource	Outsource
Accounting Staff	Outsource	Outsource	Outsource	Outsource	Outsource
Payroll/Benefits Manager	Outsource	Outsource	1	1	1
Financial Analyst/Budget Director	Outsource	Outsource	1	1	1
<b>Finance, Accounting, &amp; Budget</b>		<b>1</b>	<b>3</b>	<b>3</b>	<b>3</b>
COO		1	1	1	1
Director of Operations	1				
Director of Technology		1	1	1	1
Technology Coordinator	1	1	2	2	2
Facilities Manager		1	1	1	1
Transportation Director		1	1	1	1
Transportation Coordinator	1	1	1	1	1
Transportation (Drivers/Bus Monitors)	Outsource or PT	Outsource or PT	Outsource or PT	Outsource or PT	Outsource or PT
Foodservice Manager		1	1	1	1
Food service staff	Outsource	Outsource	Outsource	Outsource	Outsource
<b>Operations Dept.</b>	<b>3</b>	<b>7</b>	<b>8</b>	<b>8</b>	<b>8</b>
<b>Total Central Office FTEs</b>	<b>14</b>	<b>23</b>	<b>27</b>	<b>28</b>	<b>29</b>
<b>LEAD Public Schools Staff (5-12)</b>					
Heads of School	0	0	1	1	1
School Directors	6	6	8	9	10
Directors of Curriculum & Instruction and Instructional Coaches	4	7	7	10	12
Deans of Culture	2	4	5	8	9
Office Managers/Receptionists	7	9	10	10	10
Business Managers	2	3	4	5	5
Counselors	4	7	7	8	11
Paraprofessionals/Aides/Translators	11	18	23	29	29
Translators					
Classroom Teachers	70	120	160	203	231
Special Education Teachers	14	21	27	31	35
<b>Total FTEs at all LEAD Public Schools</b>	<b>120</b>	<b>195</b>	<b>251</b>	<b>311</b>	<b>353</b>
<b>Total network FTEs</b>	<b>134</b>	<b>218</b>	<b>278</b>	<b>339</b>	<b>382</b>

### School Staff Structure

1. Complete the table(s) below outlining your school staffing rollout plan for a “typical” elementary school and/or a “typical” high school, as applicable.

#### LEAD Public Schools 5-12 Rollout Staffing Model

Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
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Head of School	0	0	0	0	0	0
School Directors	1	1	1	2	2	2
Directors of Curriculum & Instruction	1	1	1	1	2	3
Deans of Culture	0	0	1	1	2	2
Office Managers/Receptionists	1	2	2	2	2	2
Business Managers	0	0	1	1	1	1
Counselors	1	1	1	2	3	3
Paraprofessionals/Aides/Support Staff	2	3	5	5	7	7
Classroom Teachers	10	19	28	38	45	52
Special Education Teachers	2	3	5	6	7	8
<b>Total School FTEs</b>	<b>18</b>	<b>30</b>	<b>45</b>	<b>58</b>	<b>71</b>	<b>80</b>

2. Describe the administrative and staff structure planned for each school, including the number and types of positions. Note the teacher-student ratio, as well as the ratio of adults to students for the school. Explain how the relationship between the school’s senior administrative team and the rest of the staff will be managed.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

Each LEAD public school is designed to start with the leadership and staffing structure noted in the chart above in years 1 - 6. Modifications will, of course, be made to accommodate increases or decreases in enrollment, and variations in ELL, Special Education, Life Skills, and/or other enrollment demographics. Student to staff ratios range from 7.8 students per staff member in year one to 10.6 students per staff member at full enrollment.

**School Leadership & Staffing Plans, Hiring, Management and Evaluation**

1. Explain the relationship that will exist between each school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If there will be employment contracts, explain their general terms. Provide, as **Attachment 17**, any personnel policies or an employee manual, if developed.
2. Outline proposed school salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system.
3. Describe your strategy, plans, and timeline for hiring school leaders. Explain your pipeline and process for developing or identifying leaders. Who will lead this process? What are its phases and associated costs?
4. Describe your strategy, plans and timeline for recruiting and hiring teachers. Explain key selection criteria and any special considerations relevant to your school design. What aspects of teacher recruitment and hiring will be managed at the school level vs. the network level? Who is responsible for managing this process? What key partnerships will support staff hiring? Identify known sources from which you will recruit teachers.
5. Explain your strategy for retaining high-performing teachers.

6. Outline school procedures for hiring and dismissing school personnel, including conducting criminal background checks.
7. Explain how – and how frequently – the school/network will evaluate the performance of the school leader and faculty. What key elements will drive evaluations, and who will conduct them? Provide, as **Attachment 18**, relevant evaluation tools.
8. Explain how the school/network would handle unsatisfactory leadership or teacher performance, as well as leadership/teacher changes and turnover. How will the school/network identify and address development needs or concerns?

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

Our organization values high-caliber people as a source of strength. To fuel the continued success of the organization, we must continue to attract, retain, and develop bright, motivated and innovative individuals. Over the past several years, our organization invested significantly in developing high quality candidates, recruiting them to our team, developing their skills as teachers and leaders, and rewarding those who perform. Our leadership development efforts will be a strong foundation for staffing all LEAD schools. In addition, the human capital initiative is a significant effort by LEAD to use its ability to innovate in human resources as a competitive advantage over traditional public school systems and other charter public schools. Developed partnerships with Teach for America, New Leaders for New Schools, high-performing charter schools and CMO's around the country, and relationships with local and state universities will continue to provide a valuable human capital pipeline as LEAD Public Schools staff our schools with the most qualified, dedicated, and passionate applicants.

At LEAD Public Schools, we expect the best from our staff—from our School Directors to our teachers and our bus drivers. Our hiring process is comprehensive and focuses on three unwavering qualifications: expertise in a chosen field, commitment to serving under-served students, and most importantly, a passionate commitment to doing “Whatever it Takes” for our students to succeed.

LEAD instructors collaborate weekly, are organized into small groups led by an experienced lead instructor, and participate in a peer coaching system; thus, the ability to work effectively in a team environment is just as imperative for our students as it is our instructors. To model leadership and respect that it is a life-long process requiring extraordinary personal commitment, all LEAD instructors are hired or re-hired annually on an “at-will” basis and supported via a comprehensive system of observations, training, and assessments used to evaluate their instructional, cultural, and community leadership.

As the primary leader of the school, the School Director must be an extremely strong leader, capable of developing and supporting excellence in teaching, learning, and parental involvement, and possessing a deep, unwavering passion for this work. While LPS prefers to hire from within, we do not do so exclusively and anticipate our School Director hiring to include a national search. We will use our extensive relationships with a number of universities and other channels, including Teach for America, New Leaders for New Schools, and the CEO and President/COO's relationships with various high-performing CMO's around the country to attain the highest quality School Directors and staff. Additionally, LEAD is developing leaders within its own organization (Curriculum Directors, Counselors, and Deans of Culture) who may be considered

for future School Director positions. LEAD has a track-record of identifying, recruiting and hiring excellent school leaders for its schools, including most recently, Mike Risen, an internal hire and School Director of LEAD Academy Middle School, and Edon Katz, an external hire and School Director of Cameron College Prep.

The hiring of future School Directors will follow our standard School Director hiring process. All applicants will receive a screening of their resume and cover letter and selected candidates will then be asked to begin the process with an initial interview with the CEO. Next steps include additional exploratory interviews with existing LPS principals. Selected candidates will be asked to come to a LEAD school for a full day of interactions expected to include:

- Part of the day shadowing a current LPS School Director
- Delivering a model professional development presentation or teaching sample in front of other teachers
- Producing an on-demand writing sample
- Observing an actual lesson (or, if necessary, a short video of a teacher's lesson) and then debrief with the CEO or an existing school director the feedback and next steps for support they would recommend be provided to that teacher.
- Being interviewed by a panel of teachers, parents, and other staff

After this process, interview feedback will be compiled and references from past employers will be thoroughly checked. Finalist candidates will be selected and asked to return for another interview with the CEO and a panel interview that includes at least two board members and other key staff who may not have been able to participate up to this point in the process. Based on feedback from this process the CEO will select a candidate and make an employment offer. The preferred timeline for recruiting and hiring is March-December of the year preceding the opening of the school. This timeline allows the School Director to begin planning and preparing for their new role, recruiting and hiring founding teachers, and is early enough to ensure time to perform at least a one semester residency with a current LPS School Director.

LPS believes that great schools require excellent teachers that are passionate and committed to the academic achievement of all of their students. Therefore, we use every opportunity to recruit the top talent for our classrooms. LPS begins recruiting for teachers in December of each year with the bulk of hiring activity occurring in January - May. School Directors are expected to complete their hiring by June 30<sup>th</sup> of each year. The recruitment strategy for identifying top classroom talent includes:

- Attending both local and national education/teaching job fairs;
- Collaborating with colleges and universities that have credentialing programs to identify top candidates;
- Working with organizations such as Teach for America, Nashville Teaching Fellows, RISE, Nemnet and EnCorps as a pipeline of talented and diverse teacher candidates;
- Posting jobs on educational websites, job boards, and publications such as Edjoin, Teacherstachers.com, college and university job boards, craigslist, etc.; and,
- Hosting information sessions/open house for educators in the community surrounding the school.

Candidates interviewing for a position will participate in a rigorous selection process that involves existing teachers and students. LPS conducts an initial resume and telephone screening which focuses on qualifications to teach in a public school (i.e., TN or related credential relevant

experience, etc). As candidates progress beyond the telephone screen, they are provided an opportunity for an on-site interview. On site interviews may be done individually or, in the case of extraordinary large applicant pools may include numerous candidates all participating in several activities that help administrators, staff, parents, teachers, and community members evaluate which candidates have the best skills and disposition to teach at the school. The teacher interview process includes:

- Each candidate must respond to a writing prompt posed by a member of the interview team;
- Each candidate interviews with a panel of administrators, staff, and or parents;
- Each candidate presents a demonstration lesson to parents, students, and or staff;
- Each candidate takes an online survey such as those developed by the Haberman Institute.

After the close of this day, school leadership convenes to evaluate each candidate's profile and decide which candidates they will extend offers to teach at the school. LEAD values diversity in the classroom; therefore, our school leadership works with organizations to recruit new teachers from a range of backgrounds and geographic locations and attempts to produce a teaching staff comprised of a variety of experience levels. We strive to develop staff teams that value innovation and new ideas, yet also have experience to support and mentor teachers who are new to the profession. We will make a concerted effort to ensure that existing, district staff members are aware of open positions at LEAD Public Schools. District staff will be given the same opportunity as any other candidate to interview for positions at the school. All candidates will participate in the same hiring procedure as outlined above and all offers are contingent upon successful background checks and confirmation of appropriate certifications.

**Commitment to Diversity and Quality:** LEAD affirms the central significance of broad diversity for its educational environment. The philosophy of the school affirms the importance of diversity for the enrichment of the students and their educational environment. We will be proactive in recruiting students, faculty, and staff who represent a mosaic of religious, racial, cultural, and economic backgrounds bringing graduation and college admission to all our students.

To reach our goal of preparing 100% of our students for graduation and success at a 4-year college/university, LEAD Public Schools will recruit and hire the best teachers from across the country. To accomplish this task, LEAD Public Schools has already initiated relationships with many of the local universities that train instructors including, Lipscomb University, Tennessee State University, Belmont University, Middle Tennessee State University, Austin Peay University, Vanderbilt University, and Fisk University. This strategy has already attracted a healthy pool of applicants. LPS has also initiated relationships with Teach for America, New Leaders for New Schools, Teach Tennessee, and AmeriCorps to identify qualified applicants interested in a career in a LEAD school.

Our plan is not just to find the best teachers locally, but to identify the most qualified applicants nationally. Locally, we have tapped into our diverse local community contacts and begun identifying the best elementary and middle school teachers in the area.

**Hiring for the specific needs of a LEAD school's students:** To support the environment needed to assure that students needing English as a second language, LEAD will recruit teachers



who have a secondary credential as well as bilingual or ELL endorsements, and who not only have training in second language pedagogy but also have experience teaching second language learners and sheltered English classes. All teachers will be trained in appropriate methods for teaching ELL's at various levels of proficiency. These methods will include using bilingual teacher aides and coaching, preview and review strategies, and after school tutoring programs that are coordinated with the regular curriculum and designed for ELL's. Instructors will be trained to use the state English Language Development standards. Selected teachers will attend appropriate training, which will allow these teachers to become qualified to train other teachers during our summer professional development.

LEAD human resource policies are closely modeled after those of MNPS and charter school best-practices. First and second year teachers earn a base salary that is equal to a MNPS salary while teachers with 3 or more years of experience salaries can expect to earn 5-15% more than their peers at the district.

### **Professional Development**

Describe the professional development that will be offered to school leadership and teaching staff. This description should explain how professional development for the faculty will support the education program and build capacity to improve student achievement, and should include the following:

1. Identify who will be responsible for developing, leading and evaluating professional development. Identify school-level and network-level responsibilities. How will the network identify and coordinate common professional development needs across schools?
2. Describe how school leaders will be supported and developed throughout the year.
3. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.
4. Include the expected number of days/hours for professional development throughout the school year and explain how the school's calendar, daily schedule, and staffing plan will be structured to accommodate this plan. Note when teachers will have time for common planning or collaboration, and how such time will typically be used. Explain how professional development will be aligned with the interim assessment process and adjusted during the year to address areas of need that are identified.
5. Explain how the professional development program will be evaluated – at both the school and network levels – to assess its effectiveness and success.

**TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.**

Our goals and methods for our professional development program have been designed to adhere to E.D. Hirsch's research-based characteristics of high-achieving schools. As such, we make it our priority to hire, train, and maintain instructors who will:

- Have and refine not only pedagogical training but also a detailed knowledge of the subject

matter that they teach.

- Instill in all of our students the LEAD Core Habits of intellectual curiosity, responsibility, self-reliance, discipline, and dedication.
- Agree to provide all students with a definite core of knowledge and skill in each grade.
- Ensure that every student learns this core, and gains the specific knowledge and skill needed to prosper at the next grade level, thus enabling knowledge to build upon knowledge.
- Continually confer with their colleagues about effective ways of stimulating children to learn and integrate this specific knowledge and skill. The specificity of our goals enables us to monitor children and give focused attention where necessary.
- Provide parents with a detailed outline of the specific knowledge and skill goals for each grade, and stay in constant touch with them regarding their child's progress.
- Ensure that all children perform at grade level, while, seeing that the most talented children are challenged to excel.

Common planning time is a critical piece of the LEAD instructional and professional development approach. Grade level teams meet twice a week, with one meeting dedicated to curriculum planning and expedition management and the second meeting to looking at and critiquing student work. In addition, a bi-weekly meeting will be established for each instructor to meet with a Collaborative Learning instructor to discuss individual students.

Since the culture, expectations, and instructional practices at our schools are unique, new instructors, staff members, and volunteers are mentored in the LEAD way where everyone takes responsibility for all students and not just their own, reinforce school-wide expectations, foster all students' learning, and work to ensure their physical and emotional safety.

Professional development for teachers and school site leaders is a critical component of our school model and program. We believe strongly in reflective practice, which occurs in an environment where there is collaboration, use of meaningful data, and thoughtful discussion regarding instruction (Lieberman). Scheduled into the daily routine, professional development opportunities will provide teachers time to inquire about practice, study individual and group student data, develop best practices, and ensure accountability for school-wide goals. Professional development activities for teachers are based on the recommended LEAD practices, which include the opportunities described below

- **Peer Observation:** Periodic observations of a colleague to observe and debrief on best practices in the classroom.
- **PD Days:** Ten full days of professional development for school staff to plan for the year, reflect on best practices and analyze data.
- **Expeditionary Learning PD (On-site and off-site):** Professional development to ensure full implementation of the Expeditionary Learning Schools (ELS) model occurs at three separate but connected levels: on-site development, regional staff development, and national staff development. Instructors and staff will have access to all types of ELS professional development.
- **Mid-year retreat:** A half day to two-day retreat for school staff to evaluate progress, reflect, and adjust the school's plan for the final semester.
- **Weekly staff development:** An early release on Wednesdays (2:30 pm) is provided each week so that a 90-120 minute professional development period is protected.
- **Network-wide staff development:** Content area teachers meet on a Wednesday to share

best practices, review data, and discuss changes/ways to implement best practices within the classroom.

- **New teacher orientation:** A five-day intensive professional development session for all new teachers held before the start of the school year.
- **New teacher support meetings:** Monthly support and development groups for all new first and second year teachers.
- **Intensive Teacher Support and Observations:** New and struggling teachers are provided customized support every other month or as needed for one on one reflection and planning sessions (with administrator and or department chairs) to address their individual staff development needs. They are observed by their department chairs and provided with peer support in monthly department meetings.
- **Teacher Induction:** Every year begins with the entire campus staff gathering for a 10-day to 2-week induction. For returning staff, it is a chance to refresh their understanding of the LEAD model, to lead a workshop, share best-practices and enjoy the camaraderie of being a vital part of the LEAD family. For new teachers, induction is the time when they are introduced to the LEAD culture, vision, and mission. During this time, they learn the basics of everything from how to plan a lesson (see above), to how to manage their classroom, to how to manage their emotional and physical energy over a long year.

Professional Development Activity	Frequency	School Director & Deans	New Teachers	Existing Teachers
		<b>Number of Hours</b>		
All LEAD day	3 full days per yr	21	21	21
95-5 Training	1 full day per month	36		
School Director and Deans Retreat	2 full days per year	14		
Annual Staff Induction	5 full days per year		35	35
Mid-year staff retreat	1 full day per year		7	7
Weekly Staff PD	90 minutes per week		60	60
New Teacher Orientation	10 full days per year		70	
New Teacher Support Meetings	1 hr per month		10	
Key Results	5X year, 3 hours each	15		
Benchmark Collaboration Days	4 half-days per year	16	16	16
Grade level team meetings	1 hr per week		38	38
<b>Total</b>		102	219	139

A comprehensive professional development program is also in place for administrators, which includes the following:

- **Coaching:** LPS Support Center staff provides individualized coaching sessions for each school site administrator twice a month. These coaching sessions are focused on the supervision of instruction.
- **Key Results:** The LPS Support Center facilitates a Key Results session at one of the schools each month. During these sessions, the School Directors go to the other school for 3 hours. During this time, the host School Director provides a focus question for the session centered on instruction. School Directors walk through classrooms with this focus question in mind and provide the host principal with feedback about this focus question. These sessions help School Directors share ideas with regards to the supervision of instruction and all principals to generate next steps to be taken at their school sites as a result of what they see at the host school.
- **95/5:** We believe that 95% of an administrator's time should be spent at the school site

and 5% should be focused on professional development. 95/5s are monthly, half-day professional development sessions for School Directors and Deans. These sessions, led by the LPS Support Center, focus on the themes that have emerged as the most relevant based on coaching sessions.

**Staff Evaluation:** To better support our staff and provide more focused support, all professional development program is evaluated on an ongoing basis. After each session, teachers complete an anonymous survey rating their experience, offering suggestions for improvement and providing ideas for further topics.

**Coaching, Support, and Evaluation:** Staff support and professional development system is designed to encourage high teacher performance and accountability. Rooted in data driven metrics, teacher performance will be acknowledged, rewarded and replicated. If teacher performance is fair or poor, support will be provided to ensure stronger student success. New and struggling teachers are pulled out of class every other month or as needed for one on one reflection and planning sessions (with an administrator and or Content Specialists chairs) to address their individual staff development needs. If a teacher consistently underperforms, they will be let go for just cause. LEAD and its school's operate on a yearly contractual basis so that each teacher is evaluated yearly. Teacher evaluations occur throughout the school year by both the administrator and by fellow teachers. LPS will also monitor credentials in accordance with NCLB and will adhere to NCLB's definition of highly qualified. Teachers have the right to appeal any evaluation to the LEAD Public Schools office and ultimately the LEAD Public Schools Board of Directors.

**Feedback:** School Directors are evaluated semi-annually by the CEO and President/COO; part of this evaluation allows teachers, parents, and community members to participate through anonymous surveys. School Directors are evaluated on the following categories: instructional leadership, people management, resource management, problem-solving and community leadership. Parents and students also complete an annual survey that evaluates all school staff. Teacher evaluations occur throughout the school year by both the School Director and Dean of Instruction and by fellow teachers. The feedback is then incorporated into a professional development plan and discussed at a professional development meeting.

## **Start-up & Operations**

- 1. Start-Up Plan.** Provide, as **Attachment 19**, a detailed start-up plan for each school proposed to open in 2012, specifying tasks, timelines, and responsible individuals. Also complete the Start-Up (Year 0) Budget in the Financial Plan Workbook.
- 2. Transportation.** Describe the school transportation plan, if applicable. In addition to daily transportation needs, describe the plan for providing transportation for field trips and athletic events.
- 3. Safety and Security.** Provide the plan for school safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies each school will employ.

4. **Insurance Coverage.** Provide as, **Attachment 20**, a list of the types of insurance coverage each school will secure, including a description of the levels of coverage. Types of insurance should include workers' compensation, liability, property, indemnity, directors and officers, automobile, and other.

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

**Start-up Plan:** During the past few years, LEAD has successfully launched LEAD Academy, Middle and High schools and a turnaround school, Cameron College Prep. Accordingly, the LPS staff and Board of Directors recognize the challenges of planning an additional campus and that sufficient planning and adequate resources had to be marshaled and dedicated to the creation of the school. All new schools will draw upon these past experiences and a proven planning development process that includes: leadership identification, pre-feasibility assessments, location feasibility reports, community outreach, student outreach, instructor recruitment. These activities, which are outlined below and in other processes throughout this application, are paramount to ensuring a high-quality and adequately resourced school.

Each new LEAD school will begin with the 5<sup>th</sup> grade and grow one grade at a time until full enrollment of grades 5 – 12 is reached. In the event sufficient and adequate space is available LEAD may consider beginning with an initial enrollment of 5<sup>th</sup> and 6<sup>th</sup> grade, as was the case during the startup year of the original LEAD Academy. Beginning with only one or two grades allows new schools to ensure that the small, college-preparatory culture, necessary to the LEAD Model's success, is firmly established.

The NeST functions as the central office for all LEAD Public Schools and will be charged with identifying the School Director, administrators and staff. The President/COO and the Outreach Director will be assigned to support the new school development and see them through the launch. The Outreach Director works with the local community to generate support by meeting with key community leaders and developing a robust public outreach campaign. A School Development Advisory Committee will be formed with community members to provide input for the development of the implementation plan and to rally support.

The School Director will be hired as soon as possible after this application is approved and will take primary responsibility in the day-to-day logistics of opening their schools with the assistance of the LPS NeST. The School Director will participate in orientation and leadership training that includes apprenticeship at another school that uses key elements of the LEAD educational model. School Directors are selected based on successful leadership experience and demonstrated excellence in leading the achievement of proficient to advanced student performance; demonstrated capacity to meaningfully engage parents as partners; and demonstrated capacity to establish and nurture a collaborative school culture with high expectations for students, staff, and parents.

Each School Director is actively involved in recruiting, interviewing, and selecting their own faculty and staff, with the support of the LPS President/COO. Each LEAD school will start with the following leadership and support structure: School Director, Translator (if necessary), Office Manager, and a Paraprofessional to support the grade level instructional staff. The 5<sup>th</sup> and 6<sup>th</sup> grade leadership and support structure includes a School Director, Translator (if necessary), Office Manager, Dean of Students, Counselor, Director of Curriculum, and a Paraprofessional to support the grade level instructional staff in two grades. The School Director is responsible for overall student achievement and safe and effective daily operation of the school. S/he has

control over the school's budget and program in coordination with the Network Support Team. School staff will be centrally recruited by the Network Support Team and hired by each School Director.

Each school maintains LEAD's academic and school culture program, though individual sites are encouraged to innovate and improve the model. Recruitment is handled through widespread advertising, and partnerships with teacher preparation programs at various colleges and organizations like Teach for America, New Teacher Project, and Building Excellent Schools. All staff participates in an in-depth professional development program before the beginning of each school year, and ongoing professional development workshops are held at each school throughout the year. Below is a brief outline of the steps LPS proposes to follow upon approval:

1. Feasibility study
  - a. Study and assess community-specific characteristics, such as the following:
    - i. Potential number of students within a 30 minute driving area
    - ii. Current educational offerings, public and private
    - iii. Community and parental demand for educational choice
    - iv. Community funding availability
    - v. Community support from other organizations
  - b. Create budget and financial forecasts for school.
  - c. Assess overall feasibility of neighborhoods based on information gathered.
  - d. Determine primary area of focus based on comparison of feasibility studies.
  - e. Present feasibility study of primary location for Board approval.
  - f. Identify potential community partners and leaders.
2. School pre-launch
  - a. Community outreach
    - i. Attend neighborhood association meetings.
    - ii. Host community focus groups.
    - iii. Visit with local churches and other active community groups.
    - iv. Meet with other non-profit organizations serving youth.
  - b. Contact media to educate and potentially publish stories on LEAD Prep Southeast
  - c. Student outreach
  - d. Instructor recruitment
  - e. School planning and development
3. Initial launch activities
  - a. 1<sup>st</sup> year launch at facility

The Outreach Director works with each local community to support the School Director of the school with parent community outreach and education. Community engagement occurs in two primary phases: 1. The school startup phase, and 2. The student outreach phase.

**Startup Phase Services:** Below is a list of services the LPS NeST Team provides to all School Directors and their teams to ensure a successful opening:

- **Secure School Facility:** The President/COO will work with the ASD to coordinate the development of a work-plan and other relevant plans to ensure that the facility is ready and available on Day One and meets LEAD's rigorous standards.
- **Secure Startup and Ramp-Up Funding:** The Director of Development and the CEO secure necessary startup funding and operational funding up to the third year in operation, at which

point each school will be financially self-sustaining a financial break-even point.

- **Engage School Parents and Community:** The Outreach Director conducts outreach to parents and community members through local organizations in target communities to determine need, readiness, and support for each prospective charter school site.
- **Recruit and Develop School Directors:** The Chief Academic Officer (*when hired*), with school staff, works with local universities, business leaders, professional education organizations, and publications to identify, recruit, and select leaders to serve as public charter School Directors. Criteria for School Directors focuses on demonstrated knowledge of best practices in instruction, and effective business practices and readiness to participate in capacity development for charter school leadership at least three months prior to assignment. School Directors participate in training and an apprenticeship at a “best practice” LEAD or other effective school to learn the school model and how to manage it.
- **Develop Recruitment Pool of Great Teacher Candidates** – The President/COO and Chief Academic Officer (*when hired*) works with school staff, partners with local universities and teacher recruitment organizations (i.e., Teach for America, Teaching Fellows, New Teacher Project) for a coordinated approach to create a pool of highly qualified teachers from which the School Directors can recruit.
- **Provide Start-up Operations Checklist/Hands-on Support to School Directors:** The President/COO provides technical assistance and hands-on support to establish infrastructure systems for payroll and general accounting. The CEO and President/COO provide assistance and guidance with all aspects of charter start-up, student recruitment, master program planning, textbooks, supplies, initial baseline student assessment and outsourcing with service vendors for food and other services
- **Provide Consistent and High-Quality Professional Development Programs for School Directors and Teachers:** The CEO, working with the Chief Academic Officer and President/COO will set up partnerships with local universities and professional development organizations with demonstrated knowledge of best practices in instruction, entrepreneurial business management and public charter school leadership to design and provide a three-month leadership development program for School Directors selected to lead schools. The program includes an apprenticeship and provides day-to-day ongoing training, coaching, and support for school leaders.

**2. Transportation:** LEAD Public Schools currently owns and operates a fleet of buses purchased from the Mid-South Bus Center. All buses are maintained and inspected annually under a service contract. LPS also only employs drivers who have satisfied all state requirements, have passed background checks, and received formal training through LEAD and State training officers. LPS currently uses this fleet of buses and staff of drivers to provide transportation for students of LEAD Academy. At Cameron College Prep, as part of the unique partnership with MNPS, students are bused via MNPS bus. Included in our proposal is the same relationship with the ASD. We have found that MNPS is able to provide cheaper and more efficient transportation, allowing our phase-in school and staff to operate more efficiently and to better focus on student achievement and community outreach.

**3. Safety and Security:** *Please see pages 45-47 of this application for an outline of our safety plan and how we build a culture where security is owned by all and is not dependent on security officers or other explicit shows of force.* All LEAD schools will comply with all health and safety

laws, rules, and regulations of the federal, state, county, region, or community that may apply to the facilities and school property. In addition, all LEAD facilities will comply with the Uniform Building Code Inspection and the Standard Building Code, Standard Plumbing Code, Standard Mechanical Gas Code, federal Americans with Disabilities (ADA) access requirements, and other applicable fire, health, and structural safety requirements, local, state, and federal laws. LEAD will meet all codes for sanitation, fire, construction, stability, temperature, ventilation, and suitability of physical space. LEAD will also grant access to local health and fire department officials for inspection of the premises or operations of the school for purposes of ensuring the health, safety, and welfare of students and employees pursuant to Tennessee Statutes and National Fire Protection Association Life Safety Code, N.F.P.A. 101. As part of its management policies, LEAD has adopted and implemented a comprehensive set of health, safety, and risk management policies that address, at a minimum, the following:

- Policies and procedures for responses to disasters and emergencies
- Policies relating to blood-borne pathogens
- Policies relating to the administration of prescription drugs and other medicines
- A policy establishing LEAD as a drug, alcohol, and tobacco free workplace

All faculty and staff will undergo a criminal background check and fingerprinting to be conducted by both the local police department and the FBI, as well as a child abuse registry check. The applicants will be required to provide a full disclosure statement regarding prior criminal records. All staff will be required to produce documents for U.S. employment authorization. For medical safety, all staff will have medical clearance, including proof of medical examination and a Mantoux Tuberculosis (TB) test.

**4. Insurance Coverage:** *Please see Attachment for a full list of insurance coverages.*

## **Financial Plan**

*(No limit to budget narrative, provide as Attachment 21)*

Schools chartered by ASD are required to adhere to Generally Accepted Accounting Principles (GAAP). For multi-site operators or networks, ASD requires both **individual school/campus** and **network-level** financial budgeting, reporting, and annual audits. Each school's finances must thus be transparent and distinct from the network level.

1. Describe the systems and processes by which the organization will manage accounting, purchasing, payroll, and audits. Specify any administrative services expected to be contracted, and describe the criteria and procedures for the selection of contractors. What financial controls will be in place at the network and school levels to ensure long-term financial viability?
2. Describe how you will provide an independent annual audit of both **organization-level** and **school-level** financial and administrative operations.
3. Provide, as **Attachment 22**, a detailed budget for the operator at the **network level AND for EACH individual school/campus**. **Applicants must provide a network level budget (no template is provided)**. Applicants must **either** complete the ASD Financial



Plan Workbook (all sections) for each campus, including revenue and expenditure projections that reflect proposed growth and development needs over time; **or** may submit financial forms in the organization's existing format provided that they:

- a) Include a separate budget for each school
- b) Include a back-office budget
- c) Specify per-pupil management fees
- d) Incorporate financial implications of facilities plans
- e) Explicitly detail major assumptions including but not limited to the following:

- Student enrollment
- **All** anticipated funding sources, including:
  - Local, state, and federal per-pupil funding; eligibility levels; and annual increases
  - Other government resources
  - Private fundraising
  - eRate
  - Student fees

*Note: Both the budget forms and narrative should specify the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated and include evidence of firm commitments, where applicable.*
- Compensation (school and network/CMO levels), including:
  - Salary table and number of staff by position
  - Yearly pay increases
  - Pension contribution and other benefits
- Line items for each major expense and delineation of assumptions, including:
  - Instructional materials and supplies
  - School equipment and furniture
  - Technology for student and instructional use
  - Professional development
  - Student assessments
  - Student information system
  - Special education services
  - Student activities
  - Contracted services at school and network/CMO levels (audit, I/T, PD, etc.)
  - Rent and utilities
  - Office supplies and equipment
  - Technology for administrative use
  - Fundraising materials and resources (non-staff)
- School start-up costs
- Management fees and any other management compensation
- Facility scenarios
- Capital, contingency, and insurance reserve funds

4. Include, as **Attachment 21**, a detailed budget narrative that provides a high-level summary of the budget and how the budget reflects the mission, vision, education plan, and strategic development of the schools and network as a whole. The budget narrative

should clearly describe assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels and costs. Provide supplemental assumptions and/or explanations for budget line items as necessary. (Assumptions that are clearly detailed in the budget workbook need not be repeated in the narrative.) The narrative should specifically address the degree to which the network and school budgets rely on variable income (e.g., grants, donations, fundraising).

5. How will the organization reach its fundraising goals over the next 5 years? Provide a development plan including staffing needs.
6. What is the contingency plan to meet financial needs if anticipated revenues are not received or are lower than the estimated budget?

TYPE YOUR RESPONSE IN THE BOX BELOW, IT WILL EXPAND AS NEEDED.

**Accounting Systems and Processes:** To ensure the financial efficacy and sound operation of all LEAD schools, the Board of Directors, Finance Committee, and LEAD staff use our specific internal controls, based on charter school best practices, generally accepted accounting practices, and the Tennessee Comptroller's Uniform Accounting Manual to deliver efficient financial operations, regular reporting and transparency. LEAD presently outsources the bulk of its accounting and financial functions to W Squared, an experienced outsource provider, which provides LEAD with monthly financials statements, cashflow projections, and a system of internal controls and segregation of duties that exceeds the capacity LEAD has internally. W Squared manages all payroll, A/P and A/R processing, and general ledger accounting. The CEO and Treasurer of the Board of Directors have authorization to sign all school checks, with items over \$5,000 requiring both signatures. LEAD intends to continue to utilize the services of W Squared for the next few years as expansion efforts continue.

LEAD has received an unqualified opinion (clean opinion) from outside auditors each year of its existence and the board of directors annually engages a CPA firm to conduct the coming year's audit and provide a management recommendations letter. LEAD's accounting records are maintained on a school level basis and our auditors are able to provide individual audit reports for each school as well as the consolidated entity, LEAD Public Schools.

**Development Plan:** Our expansion plan requires \$8.5MM in new resources over the next six years. LPS is focused on positioning the organization to seek federal, state, corporate and private investments for our expansion LPS's External Affairs Department will support raising this money. LPS will continue to develop and diversify our philanthropic investments among individuals, foundations, and businesses. Since 2006, LEAD has raised over \$2.5MM in operating and capital support. LEAD intends to raise \$8.5MM from Fiscal Year 2011 to Fiscal Year 2017 for future expansion. Given its strong track record of success and an increasing network of foundation, corporate, and individual donors, LPS is ideally positioned to secure the necessary funding to complete its expansion. Below is a synopsis of our development plan.

**Secure significant lead gifts from current Foundation partners while cultivating new institutional support (Target: \$4-6MM)**—LPS has benefited from relationships with national and local foundations interested in funding charter school expansion as a key lever to educational reform. Their donations have supported capital needs, Home Office ramp-up and the opening of new campuses. Developments staff manage these relationships and oversee the grant writing and subsequent reporting that will accompany this phase in our growth. Our staffing model evidences

significant capacity to pursue this development work.

**Continue cultivating relationships with high-net worth individuals and other community members interested in educational reform efforts (Target: \$1-2MM):** Individual giving from high net-worth donors represents the best source of long-term, unrestricted funding. Hiring a Director Development in 2010 led to an increase of roughly 50% in gifts from individuals in the course of one year. Funding of this next phase of growth will require LPS to broaden its individual giving base, with an anticipated \$4-6 million to be raised through 2017.

**Expand LPS corporate outreach initiatives and develop new sources of corporate support (Target: \$1-2MM:** Nashville's business community, more than any other potential funding source, is ideally positioned to recognize the need for LEAD's growth and success in the city.

**Secure long-term partnerships with ASD and MNPS to secure under-utilized buildings (Target: secure at least two additional donations of land or building space):** Establishing unique partnerships with the ASD and MNPS, like what our organization currently has at Cameron, will dramatically reduce LEAD's capital expenses during expansion. Despite an economic downturn, LPS is positioning itself to take advantage of these kinds of partnerships and is investigating multiple funding mechanisms to put money back into the buildings in the form of capital improvement rebates or renovations.

**Contingency Planning:** LEAD's financial model evidences conservative estimates of staffing levels, expenses, and enrollment as well as the generation of substantial cash resources to support changes that may occur in the future. Our primary financial risk is funding the central office support team, not the schools, and each school's financial model is built to reach sustainability as soon as possible. Were an extreme case to present itself, LEAD's board would most likely delay the opening of a school until adequate cash resources and/or adequate facilities solutions are acquired. Through the combination of BEP funding and federal startup grants we are able to operate each school with a balanced budget in the early years as enrollment levels grow. Ongoing contingency planning is done on a monthly basis as part of LEAD's normal financial cycle, and the LEAD board annually approves an operating budget that evidences a positive cash position at year end and has obtained a line of credit from Nashville Bank & Trust to smooth cashflow during the two months of the year where BEP funding does not occur.

WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK.

## V. FACILITIES

The ASD may authorize charter schools in order to provide opportunities for students who are zoned to attend or are already enrolled in a school that is eligible to be placed in the ASD. This RFQ is designed to identify qualified operators who can then be matched with appropriate facilities as schools come under ASD's authority. This section solicits information needed to match operators with appropriate facilities.

An applicant may also seek to operate in independent facilities provided that the school must still serve exclusively children who were previously attending a school that has come under the ASD's authority.

*If you are seeking an existing public school facility to be identified by ASD, complete **Part V.A.***

*If you intend to identify and operate in an independent facility (not managed by ASD), complete **Part V.B.***

*If you expect to pursue and acquire a mix of ASD and independent facilities solutions among the proposed schools, complete both parts.*

### A. ASD Facilities

Complete this part if you expect to seek an existing public school facility to be identified by ASD for any of your schools.

1. **Basic Facilities Needs.** Describe the basic facilities requirements for accommodating your plan including number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities.
2. **Specialty Classrooms.** List your anticipated specialty classroom needs including the number of each type and the number of students to be accommodated at one time. Specialty needs may include but are not limited to the following:
  - Science labs
  - Art room (with or without kiln)
  - Computer labs
  - Library/media center
  - Performance/dance room
  - Auditorium
  - Other
3. **Administrative/Support Space.** List your anticipated administrative/support space needs including anticipated number of each:
  - Main office
  - Satellite office
  - Work room/copy room
  - Supplies/storage
  - Teacher work rooms
  - Other
4. **Physical Education/Athletic.** List which, if any, of the following are essential to fulfillment of the core athletic program:
  - Gymnasium
  - Locker rooms
  - Weight rooms
  - Field(s) (football, soccer, multipurpose)
  - Baseball/softball field

5. **Other Needs.** Identify any other facilities needs not already specified:
  - Playground
  - Large common space for assemblies and other large group meetings
  - Other special considerations (identify and explain)
6. Does the applicant have specific desired location(s)? If so, identify by current school name and/or neighborhood.
7. Is the applicant willing to share a facility with another school? (YES/NO) If so, name the desired location(s).
8. Discuss contingency plans if your desired facility strategy is not achieved.

IF APPLICABLE, TYPE YOUR RESPONSE TO FACILITIES PART A IN THE BOX BELOW.

As a conversion applicant, LPS is prepared to and anticipates occupying district facilities, and all of three of our existing schools are in leased facilities currently designed for previous schools. In fact, our preference is to do just that as we believe the charge for all conversion applicants should be to produce dramatically better outcomes with the same students and same neighborhood schools. While we do require certain key elements of a facility to deliver our model, most are readily available in a district building. One of the most important elements in our success is our culture of doing *“Whatever It Takes”* and our five years of experience operating out of older facilities with significant deferred maintenance needs and an age-old building design, confirms that is possible for us to operate successfully for a few years in such environments. Additionally, our phase-in approach allows us to occupy the space for a year while carefully evaluating the pros/cons of a given facility before making premature renovation decisions and allows for community and political leaders to work with us on more comprehensive space planning design and use issues. However, sustained long term success must include significantly renovated and/or modified facilities, and our phase in approach allows us time to identify which needs are most pressing and to work with the state and local authorities to determine how to fund the proper design and upgrade of each campus.

LPS does have certain desired locations and is willing to work with the ASD to arrive at the most appropriate location based upon a variety of factors. As an example LPS would prefer to a middle school conversion in the either or both the north and southeast Nashville areas. As mentioned in the executive summary, LPS is a 5-12 educational model and an important special requirement is that we have the ability to integrate both a middle and high school on or near a single campus.

We are willing to share space. Our phase-in model is based upon shared space during the phase in period. As in our Cameron conversion school, LPS occupies one grade at a time (the phase in grades), while the phase-out grades are operated by the ASD or District. Therefore, we have experience sharing space and, in fact, our conversion model is built upon this. In the event district space cannot be obtained we will consider independent facilities, but that will require an additional year of planning as a contingency.

LPS is seeking a district facilities solution that allows us to provide students in a given neighborhood zone and their teachers and support staff the environment required to deliver a safe, effective, and high performing 5-12 college preparatory charter school. Below is a general

list of necessary (and probably minimum) space requirements.

**Required Occupancy**

- July 1 (one month prior to launch of the school).

**Daily School Users**

- 850 – 1,000 students in grades 5 - 12
- Approx. 80 staff members (assume all will drive to work)
- Est. 85,000 sq. feet (roughly) plus a gym/cafeteria/common space
- Handicap accessibility

**Interior Layout**

- 54- 60 classrooms of approximately 900-1200 sq. ft. each, including an art production space, music room, and at least two fully outfitted science labs
- Offices for 8-12 administrative staff, a safe, inviting reception area of at least 800 sq. ft.
- A teacher work room , A large conference room and two small conference rooms
- Space for sick students and nurse supervision, secure records room
- Bathrooms for students, Bathrooms for faculty
- Gym/Cafeteria/Common Space, Seating for at least 250 at meal time
- An on site production kitchen with walk-in refrigeration and freezer space, dry storage, and adequate plumbing and electrical for equipment necessary to make and prepare meals for up to 1,000 individuals twice daily on site
- Access to the district WAN and a fully installed wireless computing environment.

**Exterior Space**

- Outdoor space for student and faculty gatherings and for facilitating arrival and departure each day
- Outdoor space for athletics (at least two soccer fields, a playground, room for a community garden, and several outdoor basketball courts)
- Safe egress full size school buses to load and unload twice daily

WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK.

**B. Independent Facilities**

If you intend to identify and operate in an independent facility (not managed by ASD), describe your plan for identifying target location, any brokers or consultants you are employing to navigate the real estate market, plans for renovations, timelines, financing, etc.). If you currently hold a facility, please describe it (you may include an optional facilities attachment). Charter school facilities must comply with health and safety requirements per T.C.A. § 49-13-105. In addition, charter school applicants must be prepared to follow applicable city planning review procedures.

IF APPLICABLE, TYPE YOUR RESPONSE TO FACILITIES PART B IN THE BOX BELOW.

*Not applicable. See response in previous section.*

WHEN YOU HAVE COMPLETED YOUR ANSWER, LEAVE THE REMAINDER OF THIS PAGE BLANK

## VI. PORTFOLIO REVIEW & PERFORMANCE RECORD

The ASD will base qualification decisions, in substantial part, on the organization's past performance. Provide the following information about schools operated by the organization. ASD retains discretion to request additional information from applicants at any time during the review process, including possible site visits.

*Note:* The term “organization” applies to any applicant or partnership among groups applying to replicate a school model in Tennessee. Thus, it may include an existing school or group of schools proposing to replicate; an existing school network or CMO applying directly for a charter; a governing board proposing to contract with a CMO or other education service provider (ESP); or other entities and arrangements. *In the case of an applicant proposing to contract with a service provider, applicants should provide requested information for both entities if applicable.*

1. Using the Portfolio Summary Template provided by the ASD, provide, as **Attachment 23**, a detailed summary of all of the schools in the operator's portfolio, including the following:
  - Year opened;
  - City/location and school contact information;
  - Number of students and grade levels served;
  - Demographic and socioeconomic data – particularly free/reduced-price lunch status, race/ethnicity, special education, and English Language Learner data; and
  - Contact information for the authorizer.

If you are applying for a phase-in or takeover, specify which (if any) of the above schools are phase-ins or takeovers of low-performing schools.

2. Select one or more of the consistently high-performing schools that the organization operates and discuss the school's performance.
  - Be specific about the results on which you base your judgment that the school is high-performing. Include student achievement status, growth, absolute and comparative academic results, as available.
  - Discuss the primary causes to which you attribute the school's distinctive performance.
  - Discuss any notable challenges that the school has overcome in achieving its results.
  - Identify any ways in which the school's success has informed or affected how other schools in the network operate. Explain how the effective practice or structure or strategy was identified and how it was implemented elsewhere in the network.
3. Select one or more of the organization's schools whose performance is relatively low or not satisfactory and discuss the school's performance.
  - Be specific about the results on which you base your judgment that performance is unsatisfactory. Include student status, growth, absolute and comparative academic results, as available.
  - Describe the primary causes to which you attribute the school's problems.
  - Explain the specific strategies that you are employing to improve performance.

- How will you know when performance is satisfactory? What are your expectations for satisfactory performance in terms of performance levels and timing?
4. *For any and all schools operating in the state of Tennessee*, provide as **Attachment 24**, the most recent performance/evaluation/renewal reports produced by the authorizer(s) (or by a third-party evaluator, if applicable).
  5. *For any and all schools operating in the state of Tennessee*, provide the following in **Attachment 25**: (a) the last three years of audited financial statements for the school; and (b) the most recent internal financial statements including balance sheets and income statements (at least through the end of June 2011) for the organization and any related business entities. Be sure that the school level, ESP/CMO level, and the overall operations are distinctly represented.
  6. For the organization as a whole and any related business entities, provide the following as **Attachment 26**: (a) the last three years of audited financial statements and management letters; and (b) the most recent internal financial statements including balance sheets and income statements (at least through the end of June 2011). Be sure that the ESP/CMO level and the overall operations are distinctly represented.
  7. List any contracts with charter schools that have been terminated by either the organization or the school, including the reason(s) for such termination and whether the termination was for “material breach.”
  8. List any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated by the organization and explain.
  9. Explain any performance deficiencies or compliance violations that have led to formal authorizer intervention with any school operated by the organization in the last three years, and how such deficiencies or violations were resolved.
  10. Identify any current or past litigation, including arbitration proceedings, by school, that has involved the organization or any charter schools it operates. If applicable, provide in **Attachment 27**: (1) the demand, (2) any response to the demand, and (3) the results of the arbitration or litigation.

IF APPLICABLE, TYPE YOUR RESPONSE TO FACILITIES PART B IN THE BOX BELOW.

**Higher-Performing School Review:** Overall, our highest performing school is our high school; however, in specific subject areas, our middle school, in terms of value-added scores, has consistently demonstrated strong results for students. The high school, with only one year of operation, has demonstrated unparalleled results for students and staff in absolute scores. For example, LEAD only trailed Nashville’s two selective magnet schools, with 86% of LEAD’s students scoring Proficient/Advanced in Algebra I, 64% in English I, and 51% in Biology I. These raw scores place LEAD among the top-three highest performing schools in Nashville and the highest-performing non-selective school.



In terms of raw growth, our school effect size for Algebra I was 31.9, placing LEAD in the 97<sup>th</sup> percentile in the state, and in Biology I it was 16.9, placing it also in the 97<sup>th</sup> percentile statewide. In the middle school, in specific areas, students performed as well, if not better, than our high school, specifically in math and science. In both subject areas, the middle school outperformed the District and was within several percentage points of the State. Growth in both areas was impressive and demonstrated that our math and science departments are producing demonstrable results for students. Part of the reason for the overall scores in the high school, as well as for the middle school science and math results, can be found in the continuity of staff and the continued refinement of the curricula. One of the lessons we are learning as an organization is that our strongest teachers typically have at least 3-4 years experience in their subject area and at least a years experience at LEAD. This continuity is important in that they have enough time in the classroom to have established a track record of success and enough time at LEAD to understand the LEAD model and have the confidence and skills needed to fully implement it.

Further evidence of success in the math and science departments in the middle school and overall in the high school can be found in our implementation of the Expeditionary Learning (EL) instructional model. All LEAD schools implement the EL instructional model and, in comparative terms, LEAD High School is our highest implementing school. Evidence supporting this claim comes from outside evaluations provided by EL staff and by internal monitoring documents, including staff and student surveys, and student and teacher performance data. The success at the high school can be attributed to several factors, including the high school having a more experienced staff, both in years of teaching and years at LEAD, as well as the high school receiving a Gates Foundation grant to support the professional development of staff in the EL model. Success can also be attributed to the fact that more than 75% of our high school students had attended at least 1 year at our middle school.

Overall, the success of the high school and in the math and science departments demonstrates that the LEAD 5<sup>th</sup> -12<sup>th</sup> grade model is working, with the emphasis on remediation and skills-development in the middle school years paying off in the high school, and is worth replicating at future schools. Additionally, targeted professional development coupled with regular, rigorous review of teacher and student performance data is critical to gaining the real-time data needed to support growth at the staff and student level. Finally, due to the high school's success, we have exported the EL implementation standards to our middle school and to Cameron College Prep and are seeing a much higher level of implementation at both schools this year.

Based on the data, as well as District feedback, it is clear that supporting our special needs students is a strength of our organization. Since opening, we have consistently had a higher percentage of special needs students at our schools and have worked to aggressively support them through our Collaborative Learning Instructors, targeted professional development for all instructors in accommodating multiple learning needs into daily classroom instruction, and implementing our highly effective full inclusion model. These efforts have resulted in a high number of students with special needs passing the TCAP and EOC tests. As a result, our collaborative learning model—with the high level of professional development for staff and full inclusion model for students—is a hallmark of our school and educational models across our network of schools.

**Lower Performing School Review:** While the LEAD Middle School demonstrated lower than expected raw Proficient/Advanced Reading results this past year, in terms of growth, it outperformed the expected growth standard in value-added results in all grades except 7<sup>th</sup> grade.

Since our opening, we have struggled to demonstrate single-year growth with our students. Much of our success in reading has been found in 2 and 3-year growth.

A further challenge in demonstrating strong 1-year gains is that, unlike other charters, we accept students in any grade. In reviewing the data, it is clear that our students need a greater level of support in the grades they enter and require multiple paths to reach grade-level reading and writing skills. This year, based on reviews of data and past performance, the middle school has begun implementing a more robust remediation program for ALL new students, regardless of the grade they enter. This program includes tutoring requirements for all students performing below grade level on baseline assessments as well as interim assessments delivered throughout the year.

Past results have also led us to split our English/Language Arts instruction into two distinct classes--Reading and Writing—in every grade level, even though Writing Assessments are only given in the 5<sup>th</sup> and 8<sup>th</sup> grades. Adding the Writing classes to the 6<sup>th</sup> and 7<sup>th</sup> grades will supplement the Reading courses in those grades, as well as provide a continuous, linked curriculum for all of the middle school grades.

Finally, to further focus on improving instruction in reading, we are taking concerted steps to implement our reading curriculum and instructional practices across all classes in a grade-level, stressing reading in every class. Functionally, this means that we are making a more focused effort to implement the EL instructional practices in science, math, and social studies, as well as focusing literacy practices in subject areas to improve results across the curriculum.

As with all results, success will be determined using multiple measures, including end-of-year tests, interim assessments, staff and student surveys, and staff evaluations. While results were mixed in reading, the LPS Executive Team and the middle school administrative team are carefully monitoring progress so as to build on past success while improving the few areas in need of improvement.

***LPS has had no contracts terminated, no revocations or lawsuits, no authorizer intervention and no current or past litigation.***



## Charter Agreement Tennessee Achievement School District

This Charter Agreement (Agreement) is entered into by and between the Achievement School District (ASD) and **Brick Church College Prep, LLC** (Operator), a Tennessee nonprofit limited liability company, pursuant to Tennessee Code Annotated § 49-1-614 and the Tennessee Public Charter Schools Act, T.C.A. § 49-13-101 et. seq.

### Definitions

The following are definitions of terms used in this agreement as defined in State law.<sup>1</sup>

**Achievement School District (ASD)** – An organizational unit of the department of education, established by the commissioner for the purpose of providing oversight for the operation of the total program for individual schools or LEAs.<sup>2</sup> . The ASD may contract directly with individuals or non-profit corporations to manage schools, or authorizer charter schools to serve students zoned to attend ASD schools.

**Application** – The document submitted by the Operator in response to a request for proposals or qualifications to provide educational services to students zoned to attend ASD schools.

**Local Education Agency (LEA)** – Any county, city or special school district, unified school district, school district of any metropolitan form of government or any other Tennessee school system in which schools under the jurisdiction of the ASD are located.

**Memorandum of Understanding (MOU)** – An agreement secondary to this contract, specifying further details of the working relationship between the ASD, the Operator and/or an LEA or LEAs.

**Operator** – In this agreement, “operator” refers to either the sponsor of an application to receive a charter from the ASD; the governing body of an approved charter school; or an individual, governmental entity or non-profit entity entering a contract with the ASD to “manage the day-to-day operations of a school or schools within the ASD”.

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<sup>1</sup> Pursuant to Tennessee TCA 49-13-104. All Tennessee laws may be accessed online at <http://www.lexisnexis.com/hotttopics/tncode/>.

<sup>2</sup> Pursuant to Tennessee § 49-1-602. T.C.A. 49-1-614.



## 1. Grant of Charter

The ASD hereby grants a charter to the Operator for the phase-in management of **Brick Church College Prep**, formerly known as Brick Church Middle School, for ten (10) consecutive school years, beginning with the 2012-13 school year. In accordance with the terms of the Operator's Application, the Operator will operate the **5th** grade of **Brick Church College Prep** during the 2012-13 academic year, and an additional one grade of **Brick Church College Prep** each year thereafter, until the academic year **2015-16** at which time the charter school will consist of all grades 5-8. The Operator is expected to serve all ASD-eligible students who are zoned to attend Brick Church Middle School in the applicable grades. Enrollment in each year of operation shall be no less than 95% of projected enrollment reflected in the annual Board-adopted budget that the Operator submits to the ASD . An Operator who does not meet or exceed enrollment projections of students may be subject to further review by the ASD.

The ASD shall remain the chartering authority through the duration of the charter agreement and the school shall remain under the authority of the ASD. Operator will remain in good standing if school or program performance meets key threshold and performance criteria set forth in the School Performance Framework (Exhibit 5).

Upon expiration of the charter agreement, or sooner, provided the conditions for transfer set forth in state law<sup>3</sup> are met, the school shall return to the LEA that operated the school prior to its inclusion in the ASD. The Operator will also be given the opportunity to renew the charter agreement with the ASD or seek a new charter agreement with any other charter authorizer allowed under state law<sup>4</sup>.

Pursuant to T.C.A. § 49-13-121, the initial term of the charter shall commence on the effective date and end on the thirtieth (30<sup>th</sup>) day of June following the tenth (10<sup>th</sup>) anniversary of the effective date.

## 2. Roles and Responsibilities

The ASD shall ensure that the charter school is governed and operated as set forth in the Application and in accordance with this agreement and all other applicable laws and regulations. The Operator shall be accountable to the ASD for ensuring the implementation of the terms and conditions of this agreement.

During the term of the charter, the ASD shall retain the right to review the academic, operational and financial performance of the Operator. The ASD plans to conduct scheduled desk

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<sup>3</sup> T.C.A. § 49-1-614 [link]

<sup>4</sup> T.C.A. § 49-13-121



reviews and comprehensive site visits in years two, five and nine of operation. In the School Performance Framework, key criteria have been included to measure performance of a school. If the criteria are not met, the ASD retains the right to review any and all written material and data as well as conduct site visits as frequently as necessary until all criteria are met. The ASD agrees to provide a minimum of seventy two hours notice of any site visit and will allow a minimum of three business days for an Operator to provide requested documentation. Decisions to revoke or renew the charter shall be made pursuant to this agreement and state law<sup>5</sup>.

The Operator shall be the first avenue for response in case of any grievances filed against the charter school or its employees. The Operator will establish policies and procedures for receiving and addressing grievances directed toward the Operator or its employees and will make those policies available to students, parents/guardians, school employees, the ASD and any other persons who request them. Grievances that are not resolved by the Operator, or a pattern of serious grievances may be considered in any application for renewal of this agreement or any action to revoke the charter.

The Operator will use reasonable, good faith efforts to educate children and demonstrate progress in achieving the goals outlined for all ASD schools and those goals the Operator established in its application. The goals and performance expectations of all Operators authorized by the ASD are detailed in the School Performance Framework [Exhibit 5] to this agreement.

### **3. General Terms and Conditions of the Charter Agreement**

#### **3.1 The Application**

The application in response to the Request for Qualification (application), submitted August 15, 2011, attached as [Exhibit 1], sets forth the goals, standards, and general operational policies relating to the management of the Operator's charter school. The Application is incorporated by reference to this agreement. To the extent that the Operator desires to implement specific policies, procedures, or other specific terms of operation that supplement those set forth in the Application, they shall be permitted to implement such policies, procedures, and specific terms of operation, provided that such policies, procedures, and terms of operation (i) are not otherwise prohibited or circumscribed by applicable law or this agreement, and (ii) are not materially different from those set forth in the Application.

To the extent there is a conflict between the terms of this agreement and the Application, the terms of this agreement shall govern.

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<sup>5</sup> T.C.A. § 49-13-122



Material changes to the Application must be reviewed by the ASD prior to implementation. Changes that are almost always material and which require review and approval include but are not limited to:

- adding grades not included in this agreement;
- increased or decreased enrollment constituting 15% of the school's student population or 50 students, *whichever is less*;
- changes to curriculum or pedagogical approach that are inconsistent with the Application; or
- changes to operational specifications in the Application including but not limited to transportation or facility plans.

### 3.2 Funding

#### 3.2.1 State and Local Funds

- Distribution of Funds. The ASD shall allocate and pay one hundred percent (100%) of state and local Basic Education Program (BEP) funds to the Operator on a per pupil basis as provided in T.C.A. § 49-13-112 and as calculated by the formula provided by the Tennessee State Department of Education.
- Allocation of Funds Based on ADM. New charter schools or charter schools adding a new grade shall be funded based on anticipated enrollment in the charter agreement. Initial payments will be based on this anticipated enrollment, which must be agreed upon by the ASD and the Operator by June 15 each year. Upon completion of the grade expansion period, the Charter School's state and local funds will be allocated based on the prior year Average Daily Membership (ADM).
- Funding Timing. The ASD shall allocate and distribute one-tenth of state and local funds to the Operator by the 15<sup>th</sup> of the month in August, September, October, November, December, January, February, March, April, and June. Each state and local payment from October through April and the final payment in June is contingent on the Operator's reporting of the School's ADM to the ASD. Each payment starting in October will be reconciled to the reported ADM for the period before being released. The final (tenth) payment will not be released until the year's ADMs have been reconciled.
- Use of Funds. All BEP funds distributed to the Operator shall be used for the School authorized under this Agreement. The Operator shall not charge tuition for any student for any and all activities that take place during the official school day. The Operator may charge for preschool and/or before-and-after-school programs, unless prohibited under applicable law.



- e. Fees for Services. Any educational or operational services the ASD provides for a fee shall be specified in a separate agreement between the charter school and the ASD. Fees for services provided to the Operator by the ASD shall be deducted from the BEP payments provided to the Operator.

### **3.2.2 Categorical Funds**

- a. Eligibility. Each year, the ASD shall provide to the Operator the school's proportionate share of applicable federal Elementary and Secondary Education Act funding (e.g. Title I, Title II, Title III, Title IV or Title V) and other categorical grants received by the ASD for which the Operator's school is eligible. Schools are eligible for such funds upon approval of their plans for such funds either by the ASD or the Tennessee Department of Education as required.
- b. Fund Distribution & Reporting. Funds shall be distributed on a documented expenditure reimbursement basis with the required documentation. <sup>6</sup> The Operator shall submit grant reimbursement reports to the ASD at least quarterly and no more frequently than monthly. The ASD shall distribute to the Operator categorical reimbursement funds within 30 days of receipt of approved expenditure reimbursement requests.
- c. Use of Funds. The Operator shall comply with all federal regulations tied to such categorical funds.

### **3.2.3 Financial Management & Operations**

- a. Fiscal Year. The fiscal year for the Operator's school shall begin on July 1 of each year and end on June 30 of the subsequent year.
- b. Financial Management & Records. At the end of the fiscal year, the Operator shall prepare the school's annual financial statements in accordance with accounting principles generally accepted in the United States of America for not-for-profit organizations (GAAP). During the fiscal year, the Operator shall operate the school in accordance with GAAP, the cash basis of accounting, or any other basis of accounting, provided that the school's accounting methods allow it to prepare reports required by the Achievement School District (ASD), the Tennessee Department of Education (TDOE), and any other grantors.
- c. Records. The Operator shall record and report the school's financial information during the fiscal year and at the end of the year using the Tennessee Uniform Chart of Accounts. The Operator shall record all

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<sup>6</sup> 34 C.F.R. § 80.21.





financial transactions in general, appropriations, and revenue and expenditures records. Appropriate entries from the adopted budgets shall be made in the records for the respective funds. Separate accounts shall be maintained for each of the funds.

- d. Audit. The Operator shall undergo an independent financial audit<sup>7</sup>. The audit shall be furnished to the ASD, the Commissioner of Education, and the Comptroller of the Treasury, as approved by the Operator's governing board by December 31 of each year. The Operator will pay for the audit. In addition, the Operator shall transmit the final trial balance to the ASD using the Tennessee Uniform Chart of Accounts with the submission of the annual independent financial audit. If such audit is not received by December 31 of each year, it shall be considered a material breach of this Agreement, which the Operator shall have 10 days, or such other time as the Parties may agree, to cure. The financial audit shall include, without limitation:
  - i. An opinion on the financial statements (and Supplementary Schedule of Expenditures of Federal Awards, if applicable)
  - ii. A report on compliance and on internal control over financial reporting based on an audit of financial statements performed in accordance with Government Auditing Standards
  - iii. An Independent Auditor's Report on Compliance with Requirements that Could Have a Direct and Material Effect on Each Major Program and on Internal Control Over Compliance in Accordance with OMB Circular A-133, if applicable
- e. Interim Financial Reports. The Operator shall prepare or cause to be prepared quarterly financial reports, in accordance with ASD instructions, which shall be submitted to the ASD no later than forty-five (45) calendar days after the end of each quarter and no later than sixty (60) calendar days after the end of each fiscal year. Quarterly financial reports are not required to be submitted in the LEA Chart of Accounts format.
- f. CMO/EMO Fees. Tennessee's Basic Education Program (BEP) allows local education agencies (LEAs) and the ASD significant discretion in spending. Tennessee law<sup>8</sup> requires that funds generated for classroom components of the BEP be spent in the classroom (e.g., textbooks, instructional equipment, classroom related travel). Tennessee law also specifically prohibits a charter school operator from contracting with for-profit entities for the management or operation of the school<sup>9</sup>. Beyond those requirements,

<sup>7</sup> Conducted in accordance with TN 49-13-111(m) and 49-13-127(c).

<sup>8</sup> T.C.A. § 49-3-354(b)

<sup>9</sup> T.C.A. § 49-13-124(a)(1)





however, school and district operators determine how to spend BEP funds. BEP funds may be spent, for example, in an LEA or within the ASD for shared overhead for direct-run schools. Charter operators may pay similar fees to non-profit charter management organizations or to a sponsoring non-profit entity. In order to ensure compliance with the law and to help the ASD study and share financial practices that improve student achievement, ASD transformation partners and charter operators must include in their financial reports detailed descriptions of how any fees paid to a charter, education management, or related non-profit organizations are spent.

- g. Budget. The Operator shall prepare and provide to the ASD a draft of the school's annual budget for the upcoming fiscal year by no later than May 1. The Operator shall adopt and provide a copy of its annual budget for the upcoming fiscal year by no later than June 15.
- h. Financial Policies. The Operator shall use and follow a Financial Policies and Procedures Handbook, the Tennessee Uniform Chart of Accounts, and appropriate use of account codes, including grant codes using templates provided by the ASD as mandated by the TDE.
- i. Fund Compliance. In the event that the Operator accepts state or federal funds, the Operator shall adhere to state and federal guidelines and regulations regarding the appropriate budgeting, expenditure, accounting and reporting for such funds;
- j. Dissolution. Upon termination of this Agreement for any reason by the ASD, upon expiration of the Agreement, or if a school for which part of this contract applies should be closed or cease operations or otherwise dissolve, the ASD will supervise and have authority to conduct the business activities related to the closure or phase-out and other affairs of the school; provided, however, that in doing so the ASD will not be responsible for and will not assume any liability incurred by the school beyond funds allocated to it by the ASD under this Agreement. The Operator's personnel and its governing body shall cooperate fully with any activity related to school closure or phase out.
- k. Disposition of School's Assets upon Termination or Dissolution. Upon termination of this Agreement for any reason or if a school which is a part of this Agreement should be closed or cease operations or otherwise dissolve, then, at the sole discretion of the ASD, any assets owned by the Operator on behalf of the ASD-authorized school or schools that will no longer be operated by the Operator, including tangible, intangible, and real property, remaining after paying the Operator's debts and obligations and not



requiring return or transfer to donors or grantors, will become the property of the ASD.

- I. Insurance. The Operator will submit a copy of the current Umbrella and Directors and Officers (D&O) Insurance policies maintained by the Operator. The D&O policy will have a minimum limit of \$3,000,000 and the umbrella policy will have a minimum limit of \$4,000,000 and will cover areas of:
  - iv. .... Employee theft
  - v. .... Money and securities while on premises or in transit
  - vi. .... Forgery
  - vii. .... Funds transfer fraud
  - viii. .... Computer fraud
  - ix. .... Money order and counterfeit currency fraud
  - x. .... Credit card fraud
  - xi. .... Optional client coverage
  - xii. .... Coverage for investigative costs for covered losses

### 3.2.4 Financial Performance Requirements

#### 1. Annual Audit

- i. The annual audit will be submitted to the ASD by December 31 of each year, related to the prior year.
- ii. The audit should express an unqualified opinion on the financial statements. A qualified audit opinion will result in an automatic review and explanation from the charter school board.
- iii. No material weaknesses in controls should be disclosed during the audit. A material weakness will result in a potential review and explanation from the Operator's board.

#### 2. Financial Indicators

- iv. A prior year operating deficit will result in a potential review and explanation from the charter school board.
- v. Any default on payroll or any debt or non-compliance with debt-related covenants will result in an automatic review and explanation from the charter school board.
- vi. End of year current ratio of less than 1.0 will result in an automatic review and explanation from the charter school board. A current ratio between 1.0 and 1.1 will result in a potential review and explanation from the charter school board.
- vii. End of year debt service coverage ratio of less than 1.0 will result in an automatic review and explanation from the charter school board. A debt service coverage ratio between 1.0 and 1.1 will result in a



potential review and explanation from the charter school board.

- viii. Average end of year unrestricted cash balance (based on the four quarter-ending cash balances) of less than 30 days of current fiscal year operational expenses will result in an automatic review and explanation from the charter school board. Average end of year unrestricted cash balance between 30 and 60 days of operational expenses will result in a potential review and explanation from the Operator's board.

### 3. Compliance Items

- ix. Reporting should be consistent with agreed timelines for the annual report/audit, the annual budget and the annual financial report (AFR).
- x. Quarterly financial statement submissions should be received by the ASD within the agreed timeframe.
- xi. Revenue reimbursement reports for non-BEP funds should be submitted at least quarterly and no more frequently than monthly.
- xii. Operator's Board of Director/Trustees must sign and submit a signed conflict of interest form annually.
- xiii. Operator's board should be able to provide documented minutes and agendas from finance committee and full board meetings throughout the fiscal year, upon request.
- xiv. The annual audit will be presented, reviewed and approved at a regular board meeting.

### 3.3 Student Population and Enrollment

The Operator may serve only students geographically zoned to attend ASD schools. As a public school in the state of Tennessee, the Operator shall serve all students zoned for its school, up to its enrollment capacity. If applications exceed the capacity of the charter school, the Operator shall conduct a lottery, giving first priority to students geographically zoned to attend **Brick Church College Prep**. If space exists after enrollment of those students, students zoned to attend other ASD-eligible schools in **Nashville** may enroll or be included in any enrollment lottery.

Students enrolled at the charter school may transfer to any other ASD schools pursuant to ASD intra-district policies, and to other LEA schools pursuant to LEA inter-district transfer policies.

### 3.4 Facility

The charter school shall be located at **2835 Brick Church Pike Nashville, TN 37207**. The Operator may use the school building and all facilities and property otherwise part of the school and recognized as part of the facilities or assets of the school prior to its placement in the ASD and shall have access to such additional facilities as are typically available to the school, its students, faculty and staff prior to its



placement in the ASD. Such use shall be governed by the terms of the Operating Agreement with **Metro Nashville Public Schools** that owns the facility (**Exhibit 2**) and the building co-location plan to which the Operator and LEA's school leader have agreed (**Exhibit 3**), as applicable. The Operator shall maintain insurance that meets the requirements in the Operating Agreement and provide to **Metro Nashville Public Schools** prior to occupancy, a copy of its certificate of insurance, naming **Metro Nashville Public Schools** as an additional insured.

To the extent there is a conflict between the terms of the Operating Agreement and the co-location plan, the terms of the Operating Agreement shall govern.

### **3.5 Transportation**

Subject to the terms of the Operating Agreement, transportation shall be provided by Operator pursuant to T.C.A. § 49-13-114, free of charge to and from school on regularly scheduled school days for all students:

- a. residing outside of the LEA's defined Parent Responsibility Zone;
- b. required to cross hazard zones between home and school; and/or
- c. with transportation requirements included in their Individualized Education Programs (IEPs).

### **3.6 Assessment**

- a. The Operator shall have the autonomy to devise its own student assessment programs, beyond the following requirements:
  - i. Administer all TDE-required student assessments, including but not limited to TCAP, End of Course Assessments, Writing Assessments, ACT, Explore and ELL Assessments for the required grades and testing windows.
  - ii. Administer the ASD-required student assessment, NWEA Measure of Academic Progress (MAP) three times per year in grades K-10 in the required testing windows.
- b. The Operator shall comply with all TDOE- and ASD- required assessment administration and reporting requirements.

### **3.7 Compliance with Applicable Laws, Regulations and State, Federal and ASD Policies, Reporting Requirements and Grant Commitments**

By signing this agreement, the Operator warrants that it has specific knowledge of:

- a. its statutory obligations and that it will comply with all federal, state and local laws applicable to the provision of public education within a charter school in the ASD. Further assurances are provided in the Application. The Operator acknowledges the regulatory and/or statutory requirements listed in T.C.A. § 49-13-105(b), which cannot be waived and understands that the provisions of



the Tennessee Public Charter School Act, T.C.A. § 49-13-101 et seq. also may not be waived by the commissioner.

- b. its state and federal grant obligations and that it will comply with all grant assurances to which the Operator has agreed, including but not limited to the following grants: School Improvement Grant (SIG), Title I and Title II, IDEA and the US Department of Education Investing in Innovation grant .
- c. State, Federal and ASD compliance reporting requirements, as reflected in **(Exhibit 4)**.

### 3.8 School Performance Expectations

- a. Federal and Tennessee Compliance
  - i. The ASD will complete an annual audit and periodic reviews of the Operator’s compliance with federal and state laws and regulations, including but not limited to: operational and student and staff safety, employment and service requirements. The compliance checklist will be provided in advance of any reviews.
  - ii. Non-compliance with any state or federal laws will trigger review and may result in immediate closure.
- b. Tennessee Department of Education (TDOE) Achievement
  - i. The ASD will complete an annual threshold test of all schools to determine their compliance with TDOE academic performance targets as defined in the TDOE’s Accountability Framework.
  - ii. Schools must meet TDOE school accountability goals to remain authorized by the ASD.
  - iii. New schools in their first year of operation in the ASD are not held accountable to the TDOE school accountability system.
  - iv. In the event that the Operator’s school fails to meet TDOE school accountability goals for two years in a row following the first year of operation, the Operator’s authority to operate the school may be revoked.
- d. ASD School Performance Framework
  - i. The ASD School Performance Framework **(Exhibit 5)** establishes school performance indicators with targets that are equal to or exceed state or LEA performance targets.
  - ii. The ASD will publicly report annually schools’ performance according to the ASD School Performance Framework on School Report Cards and Portfolio Report Cards. Operators shall make available data required to report achievement and progress, according to the ASD School Performance Framework.
- e. ASD School Performance Composite Score



- i. The ASD School Performance Framework includes a subset of metrics that combine to create a Composite Score (**Exhibit 5**) to determine if schools are on track to dramatically improve outcomes for students.
- ii. The Operator's individual performance targets within the Composite Score and broader ASD Performance Framework must be reflected, to the degree required, in applicable grant applications, including, but not limited to the Title I and SIG grant applications. If the Operator commits to performance targets in a state or federal grant application that exceed targets reflected in the ASD Performance Framework, the Operator must adhere to its grant obligations.
- iii. The ASD will use the Operator's School Composite Score to determine the closure or rate of replication for the Operator's schools in the ASD (**Exhibit 6**).

### **3.9 Hold Harmless**

Hold Harmless. The Operator agrees to indemnify and hold harmless the State of Tennessee and, subject to the Operating Agreement, the local government entity which owns any building in which the school is located, as well as their officers, agents, and employees from and against any and all claims, liabilities, losses, and causes of action which may arise, accrue, or result to any person, firm, corporation, or other entity which may be injured or damaged as a result of acts, omissions, or negligence on the part of the Operator, its employees, or any person acting for or on its or their behalf relating to this agreement. The Operator further agrees it shall be liable for the reasonable cost of attorneys for the State and the local government entity in the event such service is necessitated to enforce the terms of this agreement or otherwise enforce the obligations of the Operator to the State.

In the event of any such suit or claim, the Operator shall give the State immediate notice thereof and shall provide all assistance required by the State in the State's defense. The State shall give the Operator written notice of any such claim or suit, and the Operator shall have full right and obligation to conduct the Operator's own defense thereof. Nothing contained herein shall be deemed to accord to the Operator, through its attorney(s), the right to represent the State of Tennessee in any legal matter, such rights being governed by T.C.A. § 8-6-106.

### **3.10 Monitoring, Inspection and Certification of Records**

The ASD shall at all times have authority to enter the charter school to monitor Operator's compliance with applicable law and the terms of this agreement. The Operator shall designate a representative to serve as the point person for ensuring compliance, reporting, and other communications related to the Operator's compliance.



**3.11 Services Provided by the Local Education Agency (LEA)**

The parties agree that services provided by the LEA to the Operator shall be based on a schedule developed by the LEA and the Operator, or a schedule developed by the ASD.

**4. Incorporation by Reference**

Each of the following documents is included as a part of this agreement by reference. In the event of a discrepancy or ambiguity regarding the Operator's responsibilities and performance under this agreement, these items shall govern in order of precedence below:

- A. Application in response to Request for Qualification
- B. Memorandum of Understanding between the ASD, Operator and/or LEA.

**5. Effective Date**

This agreement shall not be binding upon the parties until it has been signed first by the Operator and then by the ASD. When it has been so signed and filed, this agreement shall be deemed effective as of June 1, 2012.

X   
Chris Barbic  
Superintendent, Achievement School District

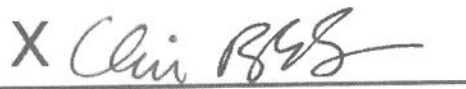
X   
Chris Reynolds  
President & COO, LEAD Public Schools



Exhibit 1 – Operator Application in response to Request for Qualification

Exhibit 2 – ASD-LEA Operating Agreement

Exhibit 3 – Operator-LEA Co-location Plan

Exhibit 4 – ASD List of State and Federal Compliance Reports

Exhibit 5 – ASD School Performance Framework and School Composite Performance Score

Exhibit 6 – ASD School Replication Framework





Exhibit 4 – ASD List of State and Federal Charter Compliance Reports<sup>10</sup>

Updated May 24, 2012

TN Charter Schools State Reporting Requirements to the ASD

Report	Basis	Components of Report	SDE Contact	Report Due	Recipient from LEA	Add'l Info.
Verification/Certification of enrollment lottery compliance	T.C.A. 49-13-113; Rule 0520-14-01-.04		<u>Rich Haglund</u>	Pre or post-lottery	Department	N/A if applicants do not exceed capacity
Waiver requests (to chartering authority or commissioner)	T.C.A. 49-13-105; Rule 0520-14-02	Discretionary	<u>Rich Haglund</u>	At least 60 days prior to implementation	Chartering authority or commissioner	<u>SDE Policy for Waiver Requests to Commissioner</u>
Teacher evaluation system selection	T.C.A. 49-1-302; 49-5-108; Rule 0520-02-04		<u>Aneesh Sohoni</u>	Prior to start of school year	Department	
Teacher evaluation data	T.C.A. 49-1-302; 49-5-108; Rule 0520-02-04		<u>Aneesh Sohoni</u>	TBD	Department	
Teacher licensure advancement forms	T.C.A. 49-13-111(i)	Completed form provided by department	<u>Regional SDE Field Service Centers</u>	Ongoing	Regional SDE Field Service Centers	<u>Teacher Licensing website</u>
Annual progress report	T.C.A. 49-13-120	Varies by chartering authority; but statute requires	<u>Rich Haglund</u>	Varies by chartering authority	Sponsor, chartering authority and commissioner	Audit may satisfy annual financial report requirements. The annual progress and

<sup>10</sup> Note: a complete list of all mandatory data reporting for all ASD schools will be provided to operators and school leaders prior to the start of each school year.



Report	Basis	Components of Report	SDE Contact	Report Due	Recipient from LEA	Add'l Info.
		report on the progress toward achieving goals in the charter;				financial reports are to be provided to the chartering authority and the commissioner.
Annual financial report	T.C.A. 49-13-112(e) and 120	Revenues and expenditures (including sources of all funds received)	<u>Rich Haglund</u>	Varies by chartering authority	Sponsor, chartering authority and commissioner	
Annual Audit (may meet AFR requirement, too)	T.C.A. 49-13-111(m) and 127	GAAP and GASB compliant audit	<u>Comptroller of the Treasury</u>	"As soon as practicable after June 30."	Comptroller, commissioner and chartering authority	
Surety bonds for those authorized to access or expend funds	T.C.A. 49-13-112(n)	The dept. and comptroller are working on this, since the existing forms don't fit charter schools.	<u>Comptroller of the Treasury</u>	Ongoing		The dept. and comptroller are working on this, since the existing forms don't fit charter schools.

This list does not include compliance reports that flow through the LEA, such as student attendance, special education info and other student demographic reports.



## Exhibit 5 – ASD School Performance Framework and Composite Performance Score

### Overview of the ASD Performance Framework

*The Achievement School District (ASD) uses the Performance Framework to determine the success of a school based on a common set of key performance indicators (KPI) that meet ASD and Tennessee accountability requirements. A majority of key indicators are consolidated to produce a single composite score that demonstrates the overall performance of a school. The framework also includes several other indicators that are bellwethers of school performance; that provide an early warning system of academic, operational or financial challenges at a school, as well as provide key data points that are important to parents. The Performance Framework will be applied to Achievement Schools managed directly by the ASD, ASD transformation partners and ASD authorized charter operators.*

This guide will provide detailed information about the definition of each data component of the Performance Framework as well as the decision rules of each KPI and whether a school is on track to move the bottom 5% of schools in Tennessee to the top 25% in its first five years.

It is noted that this initial framework will be amended periodically and this document will be updated to reflect any changes. The latest version of the framework will be available at [www.achievementschooldistrict.org/performanceframework](http://www.achievementschooldistrict.org/performanceframework).

#### ASD Performance Framework

The ASD performance framework includes three main components: threshold criteria, composite score and cultural indicators. The threshold criteria and composite score will be used to determine the ASD's School Action decisions about school closure, renewal and replication, in accordance with the Operator's Charter Agreement, as applicable. The cultural indicators will be tracked and publicly reported on school report cards, but will not be used to make ASD School Action Decisions. Operators will be offered at least two weeks to review and appeal performance results before they are publicly reported on school report cards.

**Threshold Criteria:** Threshold criteria are primarily financial and operational minimum levels of performance expected of each school and program. These criteria will be evaluated twice annually (typically August and January). Authorized entities that do not surpass every threshold may be subject to a review at the discretion of the ASD. Schools or Operators that violate several criteria or who are not able to bring the school back in line within a reasonable period of time will be eligible for a revocation of their charter, cancellation of their contract or discontinuation of the Operator's management of a specified school or schools, as applicable. The ASD is held to the same expectation as charter and transformation partner Operators to meet the identified threshold criteria for the management of Achievement Schools.



**Composite Performance Score (CPS):** The Composite Performance Score (CPS) is made of several performance criteria that are central to the mission of the Achievement School District in moving the bottom 5% of schools straight to the top 25% within five years. The CPS is included in the Threshold Criteria with a minimum standard for continuity as an Operator of an ASD school(s) and as a separate determinant of replication decisions (see ASD School Replication Framework, which will be posted at [www.achievementschooldistrict.org/Replication](http://www.achievementschooldistrict.org/Replication)). The components are weighted heavily in favor of growth in year over year student achievement. Criteria also include key performance indicators that are generally accepted as important bellwethers of future student and school success, including 3<sup>rd</sup> grade reading levels, 8<sup>th</sup> grade math levels, integrated community supports, equity of access for students in the community and student persistence in re-enrolling year over year.

**Cultural Indicators:** These indicators focus on safety and attendance and are generally referred to as measures of school culture. These are guides for future school performance but are also important criteria for parents when making school choice decisions. They are not included in the ASD's School Action decision-making.

## THRESHOLD CRITERIA

Threshold criteria will be evaluated twice per year with reviews planned every January and August for the previous period. Each criterion is expected to be met fully as part of the obligations of the operator to be authorized by the ASD. If an operator does not fully meet all threshold criteria, they may be subject to a review by the ASD. Minor infractions not corrected in a timely manner and major issues may result in a school contract being terminated.

Threshold criteria for school operators:

1. **Receive "clean" annual financial audit**

Each year, every school or organization managing an ASD program is expected to receive a financial audit that does not contain any material weaknesses or qualified opinions.

**Meets Threshold:** Annual financial audit is "clean" without any material weaknesses or qualified opinions

**Potential Review:** Annual financial audit includes material weaknesses, particularly in area of financial controls

**Automatic Review:** Annual financial audit includes a qualified opinion of any type

2. **Maintain positive operating income**

Each year, every school or organization managing an ASD program is expected to maintain a positive balance for operating income.

**Meets Threshold:** Annual financial audit indicates school has positive annual operating income.



**Potential Review:** N/A

**Automatic Review:** Annual financial audit indicates school has negative annual operating income

3. **Meeting enrollment projections in the school contract**

Each year schools and programs are expected to meet or surpass enrollment figures included in their contract.

**Meets Threshold:** School maintains 95% or more of projected enrollment

**Potential Review:** Enrollment is between 85-94.9% of projected enrollment

**Automatic Review:** Enrollment falls below 85% of projected enrollment

4. **Maintain adequate amounts of working capital to ensure financial viability. Measured by Current Ratio**

The current ratio is a financial measure that indicates whether a school or program is able to pay short term debt and payables such as payroll. The ratio is calculated by dividing current assets (cash or receivables) by current liabilities (debt and payables). The higher the ratio the easier it is for the school to pay its obligations. Ratios above 1.1 are considered strong. Schools with a ratio under 1.0 are generally determined to be unable to pay off its obligations at any given time.

**Meets Threshold:** Ratio higher than 1.1

**Potential Review:** Ratio between 1.0 to 1.1

**Automatic Review:** Ratio less than 1.0

5. **Maintain appropriate levels of debt. Measured by Debt Service Coverage Ratio**

The Debt Service Coverage Ratio is another measure of financial health generally defined as the amount of cash flow available to pay principal and interest on debt. For the purposes of the ASD it will be calculated by dividing net operating income by total debt service. Target ratios for debt service are the same as the current ratio with a ratio about 1.1 being positive with below 1.0 being an area of concern.

**Meets Threshold:** Ratio higher than 1.1

**Potential Review:** Ratio between 1.0 to 1.1

**Automatic Review:** Ratio less than 1.0

6. **Maintain adequate levels of unrestricted cash on hand**

Operators are expected to maintain adequate level of cash to pay short term obligations. The ASD will expect each school and program to maintain, or have access to, enough unrestricted cash to fund no less than 60 days of operations.

**Meets Threshold:** More than 60 days in unrestricted cash

**Potential Review:** 30-30 days in unrestricted cash



**Automatic Review:** Less than 30 days in unrestricted cash

7. **Meet all obligations with regards to debt payments, loan covenants and payroll**

Operators are expected pay all debt payments and ongoing payables, such as payroll, on time and all operators are expected to be in compliance with all loan covenants for which the operator has an obligation.

**Meets Threshold:** Meeting all obligations related to debt payments, loan covenants and payroll

**Potential Review:** N/A

**Automatic Review:** Default on loan covenants or delinquent on debt service payments or payroll

8. **Achieve an adequate composite score to ensure school is on track to meet student achievement growth and performance expectations.**

In addition to financial and operational criteria, program and school operators are also expected to meet annual targets related to the academic, safety and cultural performance of the school. Explained more thoroughly in the next section, operators need to maintain high levels of student performance and culture to remain a part of the ASD. The mechanism for identifying adequate progress is called the Composite Score. The score, which is measured on an eighteen or nineteen point scale, depending on grades served, typically consists of nine components that are weighted and summed annually.

**Meets Threshold:** Score an annual composite score greater than 12

**Potential Review:** Score an annual composite score of 8 - 11.75

**Automatic Review:** Score on annual composite score less than 8

## COMPOSITE SCORE CRITERIA

The composite score is the single most important indicator of school performance within the framework. It incorporates growth and absolute student performance with several other indicators that exemplify the commitment of the ASD to create a system of great schools that serve students from their local communities. The composite score consists of 8-9 essential measures of performance that are summed based on an eighteen (18) or nineteen (19) point scale, as applicable to the schools' grade configuration. Key groups of components include growth in student performance, absolute student performance, achievement gap closure, community impact, equity and student retention. A summary of the components and weights included in the composite score are presented on page 21 for schools serving grades K-8 and page 22 for schools serving grades 9-12. A definition of each component follows the summary charts.



### PK-8 Composite Performance Score (CPS) Calculation<sup>11</sup>

Components of Composite Score	Measure Description	R	Y	S	Score	%
<b>Growth Measure</b>						
School Success Measure (Growth per year)	Red: >1 $\sigma$ below state mean Yellow: state mean to 1 $\sigma$ below, Green: state mean to 1 $\sigma$ above, Blue: More than 1 $\sigma$ above state mean	1	2	3	4	21%
MAP (RIT growth in years)	Red: <1 year growth, Yellow: 1-1.49, Green: 1.5-1.74, Blue: >1.75	.5	1	1.5	2	11%
<b>Absolute Achievement</b>						
School Success Measure (%ile of all K-8 schools in TN)	Red: <25%, Yellow: 25-49.9%, Green: 50-74.9%, Blue: 75%+	1	2	3	4	21%
% of students proficient or advanced in 3rd Grade Reading (TCAP)	Red: <60%, Yellow: 60-74.9%, Green: 75-89.9%, Blue: 90%+	.25	.5	.75	1	5%
% of students passing Algebra EOC exam by end of 8th grade	Red: <60%, Yellow: 60-74.9%, Green: 75-89.9%, Blue: 90%+	.25	.5	.75	1	5%
Achievement Gap Closure In-school gap closure (includes special ed, ELL)	Red: Miss any gap closure target of 6.3% per year, Yellow: N/A, Green: 6.3-9.9% gap closure within all applicable subgroups, Blue: 10%+ with each subgroup	.25	NA	.75	1	5%
Community Impact Measure	TBD	.5	1	1.5	2	11%
Equity (FRL, SPED only) (Pegged to feeder pattern, by sub-group)	Red: >1 $\sigma$ below feeder pattern mean Yellow: Mean to 1 $\sigma$ below, Green: Mean to 1 $\sigma$ above, Blue: More than 1 $\sigma$ above mean	.5	1	1.5	2	11%
Student Persistence (Pegged to three year rolling average of feeder pattern)	Red: >1 $\sigma$ below feeder pattern mean Yellow: Mean to 1 $\sigma$ below, Green: Mean to 1 $\sigma$ above, Blue: More than 1 $\sigma$ above mean	.5	1	1.5	2	11%
<b>TOTAL</b>						<b>100%</b>

<sup>11</sup> During first two years of operation, scores for 3<sup>rd</sup> grade reading and 8<sup>th</sup> grade math will be calculated by comparing proficiency rates of a school to all schools statewide. See note on page 23 for details.





## High School (Grades 9-12) Composite Performance Score (CPS) Calculation

Components of Composite Score	Measure Description	R	Y	C	Score	%
<b>Growth Measure</b>						
School Success Measure (Growth per year)	Red: >1 $\sigma$ below state mean Yellow: state mean to 1 $\sigma$ below, Green: state mean to 1 $\sigma$ above, Blue: More than 1 $\sigma$ above state mean	1	2	3 4	___/4	21%
MAP (RIT growth in years)	Red: <1 year growth, Yellow: 1-1.49, Green: 1.5-1.74, Blue: >1.75	.5	1	1.5 2	___/2	11%
<b>Absolute Achievement</b>						
School Success Measure (%ile of all high schools in TN)	Red: <25%, Yellow: 25-49.9%, Green: 50-74.9%, Blue: 75%+	1	2	3 4	___/4	21%
ACT Composite	Red: <17, Yellow: 17-18.9, Green: 19-20.9, Blue: 21+	.5	1	1.5 2	___/2	11%
<b>Achievement Gap Closure</b> In-school gap closure (includes special ed, ELL)	Red: Miss any gap closure target of 6.3% per year, Yellow: N/A, Green: 6.3-9.9% gap closure within each applicable subgroup, Blue: 10%+ with each subgroup	.25	.5	.75 1	___/1	5%
<b>Community Impact Measure</b>	TED	.5	1.0	1.5 2	___/2	11%
<b>Equity (FRL, SPED only)</b> (Pegged to city average, by sub-group)	Red: >1 $\sigma$ below feeder pattern mean Yellow: Mean to 1 $\sigma$ below, Green: Mean to 1 $\sigma$ above, Blue: More than 1 $\sigma$ above mean	.5	1	1.5 2	___/2	11%
<b>Student Persistence</b> (Pegged to three year rolling average of feeder pattern)	Red: >1 $\sigma$ below feeder pattern mean. Yellow: Mean to 1 $\sigma$ below, Green: Mean to 1 $\sigma$ above, Blue: More than 1 $\sigma$ above mean	.5	1	1.5 2	___/2	11%
	<b>TOTAL</b>				___/19	100%





## GROWTH

### 1. Growth on the TN School Success Rate (Applies to Grades 3-11) (Weight 21% K-8 & 22% HS)<sup>12</sup>

As part of the state of Tennessee federal First to the Top grant, every school in the state is now expected to participate in a common accountability system<sup>13</sup>. The first of two overriding objectives

of the system is academic growth for all students, every year. To measure growth and absolute achievement consistently across the state, a common proficiency measure called the Success Rate (see insert) was developed to compare the collective performance of students in a school to

The success rate is a composite proficiency rate for ALL students in a school. The data inputs for the calculation of the success rate include 3 years\* of data for all of the following indicators for each school where applicable based on the assessments administered by the school.

- 3-8 Math
- 3-8 Reading/Language Arts
- 3-8 Science
- Algebra I
- English I
- English II
- Biology I
- Graduation Rate

The success rate equals:

$$\frac{\# \text{ Proficient/Advanced Students in Math + Reading/Language Arts + Science + Algebra I + English I + English II + Biology + \# HS Graduates}}{\# \text{ Tested Students in Math + Reading/Language Arts + Science + Algebra I + English I + English II + Biology + \# Students in HS Graduation Cohort}}$$

similar schools as well as all other schools in the state. The components of the success rate include the results of several key state assessments and growth will be measured by cohort performance year over year. All schools statewide will be ranked and points will be given depending on how a given school performs in comparison to schools statewide. All ASD schools are expected to exceed the mean growth of all schools statewide every year.

**Exceeds (blue):** Schools will receive the highest rating if growth is one standard deviation<sup>14</sup> or more above the average (or mean) growth in the state in a given year

**Meets (green):** Schools receive the second highest rating if growth exceeds the statewide mean and up to one standard deviation above the mean growth in the state in a given year

<sup>12</sup> The percentage of a single measure of the total Composite Performance Score varies depending on the weighting and the sum of all weights for all variables for a given school. In some years, (e.g. when a middle school doesn't yet have an 8<sup>th</sup> grade class or in the first year when the community measure is not calculated) the denominator of the Composite Performance Score will vary for a given school. Therefore, the overall weight by percentage may vary year to year by a few percentage points.

<sup>13</sup> Current information for TN accountability system available at: <http://www.tn.gov/education/accountability/>

<sup>14</sup> Standard Deviation: The performance of a single variable of all schools (e.g. growth in the success rate) can be used to calculate the mean (average) as well as the variance of each school's performance against the mean. By calculating the variance of each school, the normal expectation of growth above and below the mean can be determined. The boundaries set by what are expected rates of growth above or below the mean is known as the standard deviation. In the case of student growth, schools whose growth is more than one standard deviation above the mean experienced better than normal growth in the course of a year. Whereas, schools that perform more than a standard deviation below the mean, experienced growth that was below what would be considered normal.



**Approaching (yellow):** Schools receive the second lowest rating if growth is below the state mean to as low as one standard deviation below the mean

**Does Not Meet (red):** Schools receive the lowest rating if the school experiences negative growth or if positive growth is lower than one standard deviation below the mean

## 2. Measures of Academic Progress (MAP) Growth (Applies to Grades K-10) (Weight 11%)

MAP is a series of compute- based assessments developed by the Northwest Evaluation Association (NWEA) and adopted by the ASD for English, math and science (grades 3-10 only) administered in elementary and middle schools. MAP measures how much a student’s knowledge increases over the course of a year and provides a national, norm-referenced comparison of learning growth for a cohort of students served by a school in a given year. Since ASD schools are far behind other schools in the state, the ASD expects schools to facilitate at least 1.5 years of learning growth over the course of a year.

**Exceeds (blue):** Schools will receive the highest rating if student growth exceeds 1.75 years of learning in one year

**Meets (green):** Schools meet expectations if student growth ranges from 1.5 to 1.74 years of learning in one year

**Approaching (yellow):** School receive the second lowest rating if student growth is between 1 and 1.49 years of learning in one year

**Does Not Meet (red):** School are allocated the lowest score if schools have less than one year of growth in a school year

## ABSOLUTE ACHIEVEMENT

### 3. Absolute Achievement for School Success Measure (Applies to Grades 3-11) (Weight 21%)

*The School Success Measure is also used as a common success measure of the absolute achievement of all schools statewide. The components of the success rate include the results of the same formula used to measure growth year over year but the absolute performance measure will force rank school performance statewide and compare all schools against each other. Points will be allocated according to schools’ relative statewide achievement rankings with progressively higher targets over the years. All ASD schools are expected to perform above the statewide mean performance within three years and in the top quartile by the fifth year.*

**Exceeds (blue):** School performs in top 25%<sup>15</sup> of all schools in the state of Tennessee, meeting or exceeding the ASD’s five year target.

**Meets (green):** School has above average performance for all schools in Tennessee but has not reached the top quartile.

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<sup>15</sup> For the 2010-2011 school year, a school needs a minimum of 44% students rated proficient/advanced on TCAP to be considered in the top 25% of schools in the state of Tennessee.



**Approaching (yellow):** School or program performs below the average performance of all schools in Tennessee but higher than a quarter of all schools in Tennessee

**Does Not Meet (red):** School or program performs in bottom 25% of all schools in the state of Tennessee

4. **Proficiency Rates in Third Grade Reading (Applies to all schools serving 3<sup>rd</sup> grade) (Weight 5%)**

*A leading indicator that a student is on track for high school graduation and college/career readiness is whether a student can read on grade-level by the end of the 3<sup>rd</sup> grade. Schools will be measured using two sets of criteria. During the first two years a school is authorized by the ASD, performance will be measured by how students perform relative to all schools in the state of Tennessee. Points and the weighting on the composite scorecard will remain the same. Beginning in year three the measure will change to the absolute percentage of 3<sup>rd</sup> grade students who are proficient or advanced on the year-end Reading Language Arts TCAP assessment.*

**Years 1 and 2**

**Exceeds (blue):** School or program performs in top quartile of all schools in the state of Tennessee

**Meets (green):** School or program performs in second highest quartile of all schools in the state of Tennessee

**Approaching (yellow):** School or program performs in second lowest quartile of all schools in the state of Tennessee

**Does Not Meet (red):** School or program performs in bottom quartile of all schools in the state of Tennessee

**Year 3 and beyond**

**Exceeds (blue):** 90% or more of students are proficient or advanced on third grade reading test.

**Meets (green):** 75-89.9% of students are proficient or advanced on third grade reading test.

**Approaching (yellow):** 60-74.9% of students are proficient or advanced on third grade reading test.

**Does Not Meet (red):** Less than 60% of students are proficient or advanced on third grade reading test.

5. **Percentage of students passing Algebra by end of 8<sup>th</sup> grade (Applies to all schools serving 8<sup>th</sup> grade) (Weight 5%)**

*A leading indicator that a student is on track for high school graduation and college/career readiness is whether a student is proficient in Algebra by the end of eighth grade. Schools will be measured using two sets of criteria. During the first two years a school is authorized by the ASD, performance will be measured by how students perform relative to all schools in the state of Tennessee on the TDE End of Course Algebra exam. Points and the weighting on the composite scorecard will remain the*



same. Beginning in year three the measure will change to the absolute percentage of 8<sup>th</sup> grade students that are proficient or advanced on the TDE End of Course Algebra exam. Schools will be ranked statewide on an annual basis.

### **Years 1 and 2**

**Exceeds (blue):** School or program performs in top quartile of all schools in the state of Tennessee

**Meets (green):** School or program performs in second highest quartile of all schools in the state of Tennessee

**Approaching (yellow):** School or program performs in second lowest quartile of all schools in the state of Tennessee

**Does Not Meet (red):** School or program performs in bottom quartile of all schools in the state of Tennessee

### **Year 3 and beyond**

**Exceeds (blue):** 90% or more of students are proficient or advanced on eighth grade Algebra exam.

**Meets (green):** 75-89.9% of students are proficient or advanced on eighth grade Algebra exam.

**Approaching (yellow):** 60-74.9% of students are proficient or advanced on eighth grade Algebra exam.

**Does Not Meet (red):** Less than 60% of students are proficient or advanced on eighth grade Algebra exam.

## **6. ACT Composite (Weight 5%, High School Only)**

*A key component of college acceptance remains the score a student receives on the American College Testing, or ACT, exam. The ACT is a standardized test normally taken by 11<sup>th</sup> grade students who are interested in attending college. The ASD wants to ensure that all students have the option to pursue higher education at a competitive college. Therefore the ASD has set performance expectations for high schools that align to admissions data of competitive colleges in Tennessee. To meet expectations on the Composite Performance Scorecard students at a given high school must average a composite ACT score of 19, which is the average score of accepted and enrolled students at the University of Memphis and Middle Tennessee State University. For schools to exceed expectations, they must average a 21 on the ACT which will result in some students being competitive for acceptance to the University of Tennessee, Knoxville (average ACT: 24) as well the Vanderbilt University (Average ACT: 31)<sup>16</sup>.*

**Exceeds (blue):** Average ACT score for all students is equal to or greater than 21.

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<sup>16</sup> <http://www.act.org/>



**Meets (green):** Average ACT score for all students is equal to or greater than 19 but less than 21.

**Approaching (yellow):** Average ACT score for all students is equal to or greater than 17 but less than 19.

**Does Not Meet (red):** Average ACT score for all students is less than 17.

## ACHIEVEMENT GAP

### 7. In School Achievement Gap Closure (includes Special Ed, applies to all schools) (Weight 5%)

*The second key component of the new state of Tennessee accountability framework, that was part of the spring 2012 NCLB waiver application, is the closing of the achievement gap between identified sub-groups (i.e., Black, Latino, SPED, ELL, FRL) and every test taker. Achievement gaps are measured by gaps in student performance on the ELA and Math TCAP assessment between groups of students based on race, language and poverty. The state has set aggressive targets that require schools to close the annual gap by no less than 6.3% (0.063) per year. The ASD has set performance targets to match the state criteria.*

**Exceeds (blue):** School narrows the achievement gap between every identified sub-group and the every test taker group by more than 10% in a year

**Meets (green):** School narrows the achievement gap between every identified sub-group and the every test taker group by at least 6.3%, but less than 10% in a year. **NOTE:** This metric is consistent with the minimum annual standard in the Tennessee Accountability Framework.

**Approaching (yellow):** N/A

**Does Not Meet (red):** School narrows the achievement gap between every identified sub-group and the every test taker group by less than 6.3% in a year

## COMMUNITY IMPACT

### 8. Community Impact Measure (Applies to all schools) (Weight 0% in 2012-13; 11% in 2013-14+)

*The community impact measure will be determined by each school in collaboration with the other schools and community partners in their neighborhood (i.e., school feeder pattern) by March 2013. It will be a metric unique to each neighborhood that defines the community's collective improvement priority that will positively impact student achievement. In schools' first year of operation in the ASD, they will collaborate with their communities to define their community impact metric, determine its baseline and create a plan to address the community's priority with annual targets for improvement. Performance will not have any weighting in the school's composite score in year 1. Beginning in year*



2, achievement of the community-defined improvement target will be weighted at 10% of the composite score.

**Exceeds (blue):** TBD

**Meets (green):** TBD

**Approaching (yellow):** TBD

**Does Not Meet (red):** TBD

## STUDENT EQUITY

### 9. Equity (FRL, SPED) (Applies to all schools) (Weight 11%)

*It is important for schools and programs authorized by the ASD to serve all students equitably. As part of the commitment to the communities served by ASD authorized schools and programs we want to ensure that students from our communities have equal opportunity to enroll in the schools of their choice. Therefore, the ASD will track and report whether schools serve proportionate numbers of high needs populations including students who qualify for free and reduced price lunch as well as students with special needs.*

**Exceeds (blue):** Schools will receive the highest rating if percentage of FRL and SPED populations enrolled in a school exceeds city mean by more than one standard deviation

**Meets (green):** Schools will receive the second highest rating if percentage of FRL and SPED populations exceeds city mean but less than one standard deviation above the mean

**Approaching (yellow):** Schools will receive the second lowest rating if percentage of FRL and SPED populations is below city mean but more than one standard deviation below the mean

**Does Not Meet (red):** Schools will receive the lowest rating if percentage of FRL and SPED populations is more than one standard deviation below the mean

## STUDENT PERSISTENCE

### 10. Rate of Student Persistence (Applies to all schools for grade K-11) (Weight 11%)

*The ASD is founded on the belief that families should have an array of high-quality, safe schools from which to choose one that best meets the educational needs of their students. An important measure of how well a school is meeting the needs of its students is the percent of students whose families choose to re-enroll them year after year, as family circumstances allow. The ASD expects all of its schools to attract students by providing high quality, educational opportunities. Therefore ASD schools are expected to have less student attrition than other schools in their community.*

**Exceeds (blue):** Schools will receive the highest rating if student reenrollment year over year is more than one standard deviation above the three year rolling average for all schools in the feeder pattern serving comparable grades



**Meets (green):** Schools receive the second highest rating if student reenrollment year over year exceeds the feeder pattern's average three-year rolling average but less than one standard deviation above the rolling average

**Approaching (yellow):** Schools receive the second lowest rating if student reenrollment year over year is less than the feeder pattern's average three year rolling average but more than one standard deviation below the rolling average

**Does Not Meet (red):** Schools receive the lowest rating if student reenrollment year over year is less than one standard deviation below the feeder pattern's three-year rolling average







## CULTURE AND SAFETY CRITERIA

The ASD has also included several performance criteria in the performance framework that **will not be included** in making school closure or replication decisions. These measures, primarily focused on school culture and safety, are included to inform parents about key data points that are important to them as they make school choice decisions. The ASD, over the next few years, also expects to determine whether positive or negative performance on a given indicator correlates with student achievement. If an indicator is proven to be predictive of student achievement, it may be included in the threshold criteria or the composite score in the future.

Key culture and safety criteria include:

1. **Percentage of students who agree school is safe and has a positive culture (Applies to Grades 3-11)**

**Exceeds (blue):** 95% or more of students respond that their school has a positive culture

**Meets (green):** 85-94.9% of students respond that their school has a positive culture

**Approaching (yellow):** 75-84.9% of students respond that their school has a positive culture

**Does Not Meet (red):** less than 75% of students respond that their school has a positive culture

2. **Percentage of students suspended or expelled for serious incidents**

*Note: this measure will be benchmarked and the targets may be adjusted in fall 2012.*

**Exceeds (blue):** less than 3% of students are suspended or expelled in a given year

**Meets (green):** 3-4.9% of students are suspended or expelled in a given year

**Approaching (yellow):** 5-7.4% of students are suspended or expelled in a given year

**Does Not Meet (red):** 7.5% or more of students are suspended or expelled in a given year

3. **Attendance**

**Exceeds (blue):** Average daily attendance exceeds 96%

**Meets (green):** Average daily attendance between 93 and 95.9%

**Approaching (yellow):** Average daily attendance between 90 and 92.9%

**Does Not Meet (red):** Average daily attendance less than 90%





## FREQUENTLY ASKED QUESTIONS

**What if a school does not serve students necessary for a component of the Performance Framework to be calculated (e.g. Algebra in 8<sup>th</sup> Grade for a charter that services only grades 6-7)? How will the Composite score be calculated?**

If an indicator is not applicable to the school, the component will be removed from the calculation of the composite score. In the example of a K-8 school that serves K-6 only in a particular year, the potential 5% for passing 8<sup>th</sup> grade Algebra will be marked as not applicable (N/A) and the composite score will be determined by including only pertinent indicators in the denominator.

There is an exception for elementary schools that do not yet serve a third grade class or have not yet added all of their grades. For schools not yet serving 3<sup>rd</sup> grade the TCAP will not be administered, therefore the weights will shift (see chart) increasing the weight for MAP growth and achievement to 65. In subsequent years the weight of the MAP indicator will drop to 30% when the 3<sup>rd</sup> grade class is included in the calculation, then drop to 20% with the inclusion of a 4<sup>th</sup> grade class and finally 10% when the school adds 5<sup>th</sup> grade.

**What about schools only serving kindergarten in its first year?**

Schools only serving kindergarten will not receive a score.

**Will all measures be evaluated every year in every school?**

No. The ASD wants schools to serve students and grades and grow in ways that are appropriate for their models and the communities they serve. Therefore, some measures will not be the same for all schools in the same year of operation if their grade configurations are different. Each year, a description of measures that are included in each grade will be published. The intention of the performance framework is to provide data that tracks trends for growing schools, while providing common comparative data for schools that are serving similar grades.

**What if a school adds multiple grades in successive years? For example, a middle school that operates 6<sup>th</sup> grade only in year one, but adds 7<sup>th</sup> and 8<sup>th</sup> grade in year 2?**

Criteria will be evaluated based on the performance measures that are appropriate. In the example cited, in year 2 the 7<sup>th</sup> grade would be used to measure growth for all appropriate indicators, while all students enrolled in the school would be measured for all other criteria.

**What subjects will be included in the MAP assessment growth measure?**

In K-2 only ELA and Math will be measured for growth in MAP. Beginning in 3<sup>rd</sup> grade until 10<sup>th</sup> grade, ELA and Math will be measured in addition to science.

**How will the ASD measure in-school achievement gap closure?**

The ASD will use the same measure that is used by the state of Tennessee as part of its First to the Top federal grant application. As of the date of publication the sub-groups and comparison groups are measured in the following areas: grades 3-8 math, 3-8 reading and language arts, Algebra I and English II. Subgroups and comparison groups will include Racial/ethnic composite, economically disadvantaged vs. Non-



economically disadvantaged, English learners vs. Non-English learners and students with disabilities vs. students without disabilities. Individual subgroups will include: African American; Asian; Hawaiian Pacific Islander; Hispanic; Native American; White; economically disadvantaged; English learners; and students with disabilities.

**How will student persistence be measured?**

The student persistence figure, based on re-enrollment rates, will be measured by school and compared to three year rolling re-enrollment rates of other schools in its feeder pattern, region within the city and state wide. Eventually when the ASD has authorized a minimum of 20 schools (likely during the 2014-2015 school year), the denominator of the calculation will change to the student persistence data for ASD schools as it is expected to be a higher threshold for operators.

**What if a student leaves a school mid-year, but re-enrolls. How are they counted in the school persistence measure?**

Students that re-enroll in a school within 45 calendar days of the date of disenrollment will be included in the persistence rate.

**If the success rate includes three years of data, how will a new school be evaluated after the second year of operation?**

School data will be based on student performance from the first two years of operation from the school as well as the student data from the year before an operator began operations. This first year, known as the baseline year, will be based on data provided for students from the state of Tennessee or the home district.



**Exhibit 6 –ASD School Replication Framework**

The Achievement School District (ASD) is committed to supporting the growth of high quality school operators, whether they manage a single school or several campuses. However, the sole purpose of the ASD is to move schools from the bottom 5% to the top 25% statewide within five years by authorizing successful, external school operators and by directly managing Achievement Schools. Therefore, the pace of growth of operators will be largely dependent on the academic success of its existing campuses as well as its capacity to maintain quality while expanding.

Initially, operators will be allowed to present growth plans over several years. However, school replication approval in future years will be dependent on existing school performance against the Threshold Criteria and Composite Performance Score in the ASD School Performance Framework. Operators who plan to grow quickly will be expected to demonstrate that each approved campus is on track to be in the top 25% statewide within five years. Schools that receive high Composite Performance Scores, are deemed to be on track to the top 25% and who have received positive reviews during the mandatory site visits in the second, fifth and ninth years of operation of each school will likely be approved for all projected expansion plans. If operators are not on pace to hit these targets, growth may be slowed or halted at the discretion of the ASD.

The composite score will be the single most important measure in determining the rate of replication for a given school operator. Every year, the ASD will review composite scores for each school and make initial determinations about the rate of growth that is appropriate based on performance. Based on the current composite score criteria<sup>17</sup> the ASD has established cut scores that determine eligibility for replication (see table).

Score	Replication Rate	Likelihood of renewal
15-19	Rapid expansion of schools (>1 school per year)	High
12-14.75	Eligible for moderate expansion (~1 school per year)	Moderate
8-11.75	Halt any expansion efforts, provide support to schools	Low
4-7.75	Eligible for intervention and possible revocation	None

<sup>17</sup> It is anticipated that the Composite Performance Score criteria for determining an operator’s school replication rate will be updated periodically and reflected at [www.achievementschooldistrict.org/schoolreplication](http://www.achievementschooldistrict.org/schoolreplication).



For rapid replication, operators should plan to earn an average Composite Performance Score of 15 for all school sites authorized by the ASD. An average composite score of 12-14.75 by an operator is adequate to approach the top 25% in approximately five years, but indicates there may be a need to slow expansion to ensure each campus achieves the ASD goal. Schools that receive composite scores of 8-11.75 are in need of improvement. Expansion for these operators will be halted to give them an opportunity to improve the performance of existing campuses until each are on pace to reach the top 25% statewide. If these schools do not improve, not only will expansion be halted, but those campuses will likely not be renewed during the next renewal cycle. If schools or operators receive a composite score of less than 8, they are not on pace to reach the top 25% within the next several years and therefore will not be eligible for expansion. Additionally, the operators of these schools should expect to have their charter or contract non-renewed at the end of the term and potentially revoked sooner for management of the applicable school(s).

## R. Confirmation of Priority Exit Status

**From:** Bren Elliott <[Bren.Elliott@tn.gov](mailto:Bren.Elliott@tn.gov)>  
**Subject:** Exit Criteria  
**Date:** November 21, 2023 at 11:16:43 AM CST  
**To:** "[dwayne.tucker@leadpublicschools.org](mailto:dwayne.tucker@leadpublicschools.org)" <[dwayne.tucker@leadpublicschools.org](mailto:dwayne.tucker@leadpublicschools.org)>

Hey Dwayne,

Per our conversation, I want to confirm that on yesterday TDOE notified the Charter Commission that LEAD Brick Church met the priority exit criteria. In addition, the following information was shared with TPCSC:

1. LEAD Brick Church received a designation letter as CSI.
2. LEAD Brick Church met the one-year exit criteria and was also reidentified based on performance in 2023.

Feel free to reach out if you have any additional questions.

Bren



**Bren Elliott** | State Turnaround Superintendent

Division of School Turnaround

Andrew Johnson Tower

710 James Robertson Parkway, Nashville, TN 37243

[Bren.Elliott@tn.gov](mailto:Bren.Elliott@tn.gov)

[tn.gov/education](http://tn.gov/education)

#TNBestforAll

*We will set all students on a path to success.*

**COVID-19 SUPPORT FOR DISTRICTS CAN BE FOUND HERE:**

<https://www.tn.gov/education/health-and-safety/update-on-coronavirus.html>



## LEAD Leadership Development Plan (2019-2025)

### Where We Have Been (2019- 2021): Leadership and Talent Foundation

July 2019, marked the beginning of a multi-year integrated leadership and talent strategy grounded in the same Ethos that has guided our student outcomes since our founding. Our classroom teachers create an environment where students are ready to learn and we created an environment where our teachers and staff are ready to lead.

The leadership Ethos for teachers and staff aligns with the categories of our student Ethos. I am **Committed** - I exemplify LEAD Public School's vision and mission – every student is ready for college, ready for life. I am **Courageous**- I have the drive to be better and am vulnerable and brave enough to get there. I am **Disciplined** - I am consistently clear, focused, and driven. I am **Self-Reliant** - I take charge of my own life and am responsible for my choices. I **Serve Others** - I put the needs of others first, help teammates optimize performance, and learn from others. **Leader of Others** - I *coach* for optimal performance and invest in the growth and development of others.

Our CEO and leadership team modeled the way in 2019 committing to focused leadership development. The leadership development program allows each leader to fully understand and leverage their authentic leadership style and build a customized development plan. The program includes assessments, 360-degree feedback, and executive coaching.

### Leadership Development

**Assessments** help leaders understand and articulate their unique and authentic leadership style. The primary assessment used is called MAI Positive Core™, which combines the results of four highly respected assessment tools to create a comprehensive and actionable picture of individual and team strengths, leverage points, gaps, and targeted areas for development. The four assessments include:

- **Emergenetics Assessment** - The assessment provides clear insights into preferred thinking styles and behavior preferences which are used to increase individual effectiveness and expanded capacity in working with others.
- **VIA-IS: Signature Strengths Assessment** - The Values in Action Inventory of Strengths (VIA-IS) is a self-report questionnaire that measures 24 strengths of character organized under six core virtues. The VIA reports identify the respondent's signature values.
- **Strengths Finder 2.0** – Rooted in more than 40 years of research, this assessment has helped millions discover and develop their natural talents. The results provide a stack ranking of the respondent's signature talents.
- **Kolbe** – The Kolbe A Index measures a person's instinctive method of operation (MO); how a person takes action and solves problems; identifies the ways he or she will be most productive.
- One additional assessment is included in the Leadership Development program, the **Thomas Kilmann Conflict Mode Instrument (TKI)**. The TKI assists in understanding your preferred conflict mode, five conflict resolution approaches, and expanded tools for resolving conflict.

Participants receive **360-degree feedback** from colleagues, direct reports, their leader, and their self-reflection. 360-degree feedback helps deepen understanding of the leader's unique authentic leadership style, can be valuable in managing misperceptions, and is a rich source of information on leadership strengths and areas for focused development.

**Executive coaching** is empirically grounded, systematic, and goal-directed; designed to facilitate sustainable change. Coaching focuses on deepening learning and forwarding action. While coaching can serve many purposes within organizations, the three most correlated with success are: 1) enhancing individual performance and productivity, 2) improving organizational performance, and 3) leadership development.

Grounded in the leader's unique Positive Core™, the coaching is customized to each individual. Coaching provides an iterative process of insight and action. Coaching goals established in the first coaching session provide a high-level agenda for each coaching session. Coaches follow a coaching model marked by three principles:

1. A stance of collaboration, wherein the client and the coach are on an equal footing, with a shared conviction that the client has the inner resources and capacities to be successful. The coach avoids taking the position of being the "expert".
2. Genuine curiosity, embodied in active and reflective listening. The coach uses a combination of powerful questions and reflections to gain a shared understanding of the client's viewpoint. This exploration allows the client to deeply reflect on their beliefs and actions, gaining clarity, and insight and invoking the client's own curiosity to explore different perspectives and alternate courses of action.
3. Resisting what Motivational Interviewing founder William Miller, Ph.D. refers to as "the righting reflex" or the desire to set things right and put people on the right path (Miller, 2002). Essentially this is telling them what to do, and while done with the best of intentions, it often activates the person to do the opposite. Instead, we evoke the client's motivation and emphasize their autonomy in making change.

As a result of the assessment, feedback, and focused coaching; the leader expands understanding, achieves higher levels of focus and results, and builds a solid foundation for future success.

The focused approach to leadership development has cascaded to each leadership level in the organization.

### **Employer of Choice**

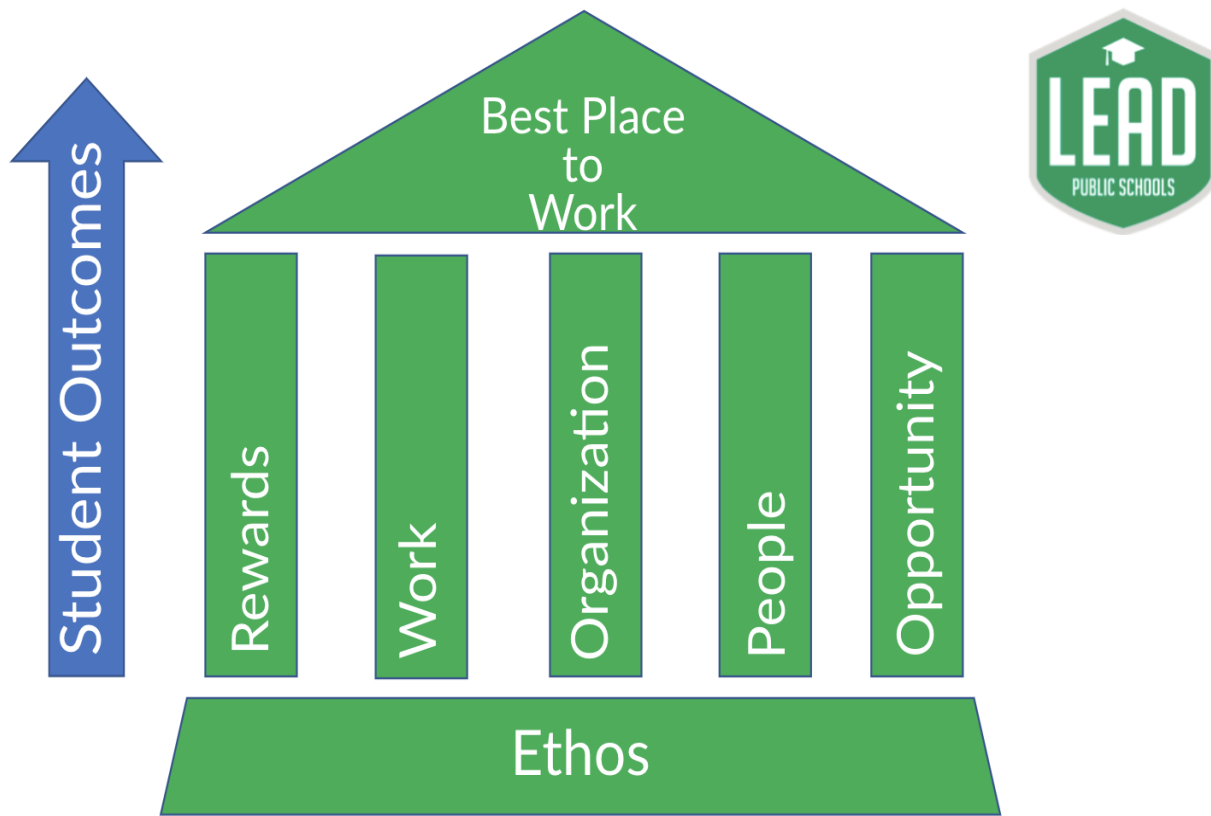
We crafted a multi-year strategy to become an Employer of Choice with an integrated approach to talent management:

1. **Talent attraction and selection** – sourcing, selecting, and onboarding the right people for the right roles at the right time.
2. **Managing performance and developing talent** – engaging each member of the team, focusing on performance, quality conversations, and coaching to build skills and capabilities
3. **Employee value proposition** – compensation strategy as part of a complete employee value proposition unique to the organization including rewards, work, organization, people, and opportunity.
4. **Building organizational capacity and capability** – organization structure, role definition with linked and clear accountabilities, effective teams, and solid Human Resource administration.

### **Employee Value Proposition**

We articulated and integrated an employee value proposition unique to LEAD in all components of our talent management strategy. **Opportunity** includes development opportunities and professional growth. **Work** includes alignment between individual interests and work content as well as work-life balance. **People** include quality of coworker relationships, quality of leadership, and the team. **The organization** includes mission purpose and reputation. **Rewards** include compensation, benefits, and paid time off.

The employee value proposition serves as a guide for investments in our culture and provides the framework for communicating our employer of choice commitment.



### **Performance Coaching and Talent Development**

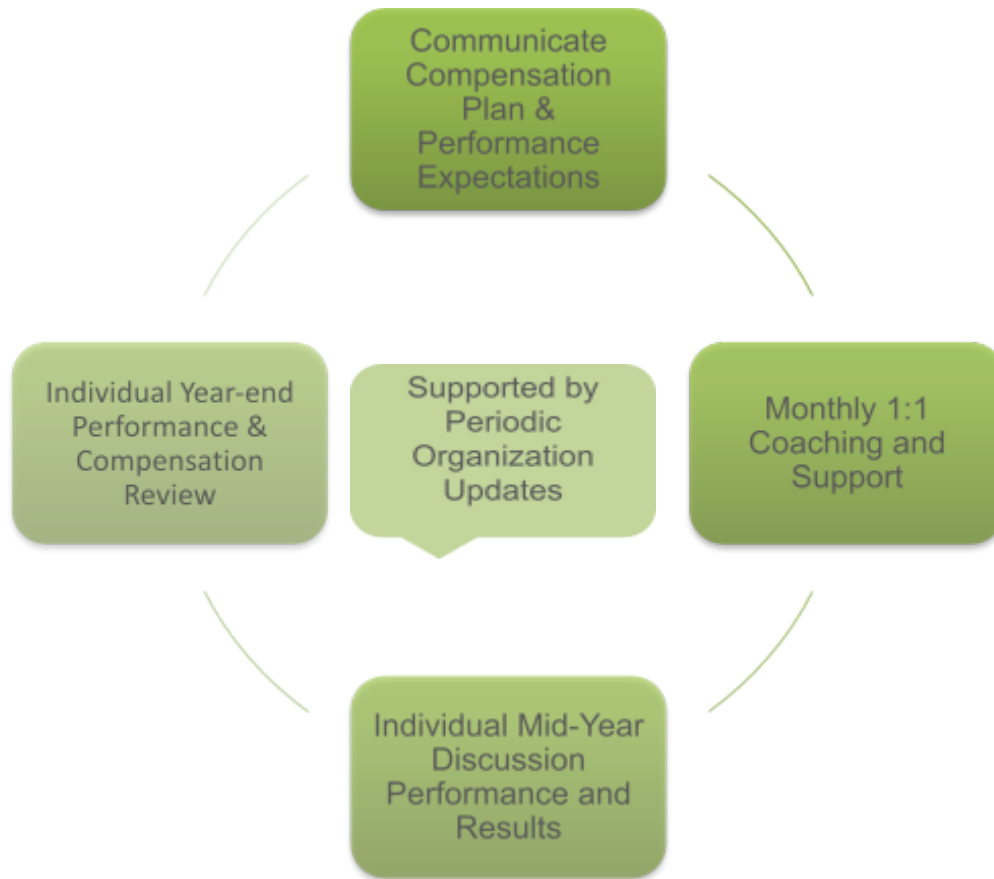
A simple focused Performance Management process was implemented. Consistent frequency and quality of performance coaching discussions create an environment where talent thrives. Awareness of brain-based implicit or unconscious bias combined with additional skills in preparing for and practicing "courageous" conversations, listening to several levels, and coaching can collectively and significantly impact the quality of performance coaching. LEAD Performance Management:

1. Creates a framework, tools, and commitment to align employees to organizational priorities and clarify accountability for performance results
2. Enables the ability to differentiate and reward performance
3. Promotes and builds on successful cultural attributes – Ethos and leadership behaviors
4. Expands capability and capacity to attract and hire qualified talent
5. Grows leaders who successfully engage employees, provide coaching and development, get work done with and through others, and achieve high levels of performance

Performance Management training is provided for all people leaders aligned to an ongoing cycle:



## Performance Management Cycle



## Talent Calibration and Succession Planning

Beginning with the role of CEO and continuing to the role of Principal, an annual talent calibration and succession plan is completed for each leadership role. Each leader is evaluated to identify core strengths as well as areas for focused development. The evaluation is a multi-dimensional view of leadership success at LEAD.

Leaders periodically receive 360° feedback on the frequency of display of behaviors aligned to our Ethos. This forms the basis for the evaluation of leadership behaviors. Specific leadership competencies have been identified for key leadership roles. Finally, all leaders commit to a common set of leadership tasks grounded in decades of research on leadership success (Kouzes and Posner – The Leadership Challenge).

This approach to talent assessment and calibration clarifies succession readiness, creates multiple career pathways, informs development planning, and results in a more robust talent pipeline. The process involves readiness assessment with target plans to close the gap in achieving ready now status.

Behaviors	Competencies	Tasks
Committed	Collaboration & Influence	Model the Way
Courageous	Managing Complexity	Inspire a Shared Vision
Disciplined	Resolving Conflict	Challenge the Process
Self-Reliant	Developing Others	Enable Others to Act
Serve Others		Encourage the Heart
Leader of Others		

## Talent Acquisition

Staff and leaders involved in talent attraction and selection have been trained in hiring for fit.

### Components of Hiring for Cultural Fit



### Background and skill review

- Review job history, responsibilities, and accomplishments including reasons for leaving and gaps in employment
- Review education, training, certifications, etc.
- Explore skills, abilities, likes, dislikes, and what the candidate is looking for

### Behavior-based interview

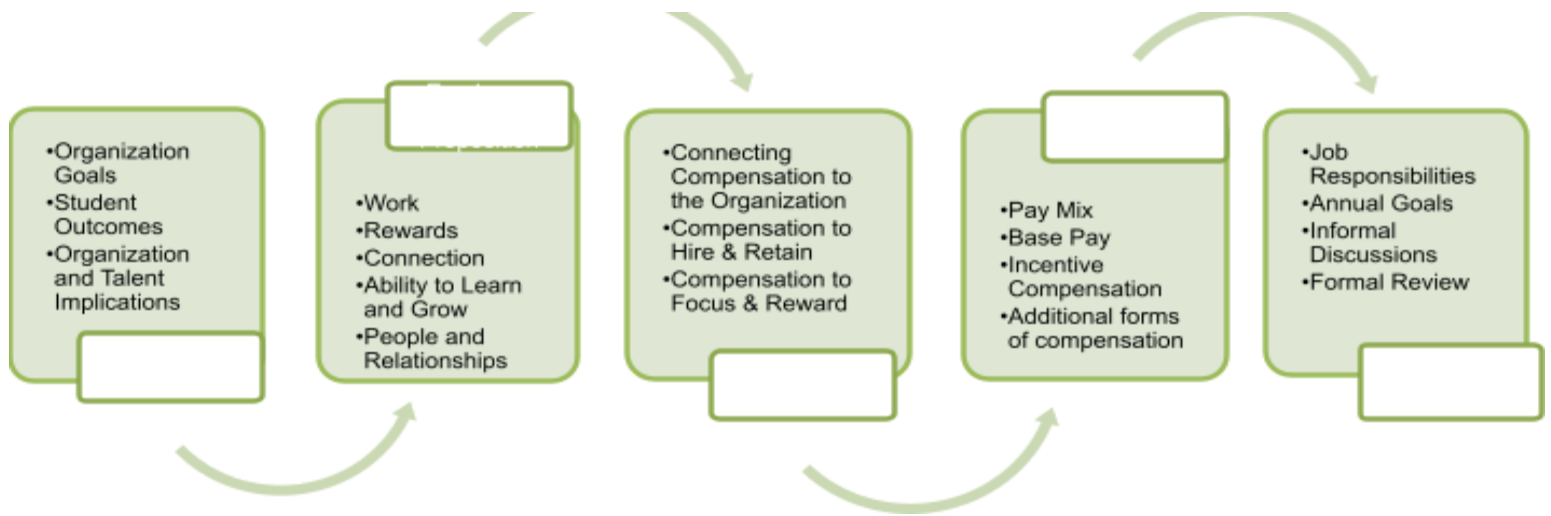
- Interview for the attributes that predict success in the role
- Ask about specific situations - past behavior is a predictor of future behavior
- Explore situation - action taken - the result of actions - what candidate learned
- Listen for information relevant to the defined competencies/attributes and the definition of success

### Motivation and cultural fit

- Review candidate's interests and motivations
- Explore conditions where candidates have done their best work
- Get to know the candidate - potential and performance

## Compensation Plan

Unique compensation plans were created for teachers and staff. As part of an integrated design, the compensation plan supports and rewards performance results and student outcomes.



### Where We Are Now (2022): Student Outcomes at Scale

To achieve student outcomes as scale we are implementing a school-based leadership model and leadership development pathways. Our school LEADership structure was designed to achieve the following:

1. **K-12 Network** - To grow to be a K-12 network and to create a sustainable future for our LEAD community.
2. **The Path to Sustainability** - To build organizational capacity and capability for sustainable growth.
3. **Enhanced Leader Development** - To enhance individual performance and career development conversations.
4. **Consistent LEADership Model** - To implement a more consistent leadership model with leadership behaviors grounded in the LEAD Ethos.
5. **LEADership Pathways** - With our talent calibration initiative, we assessed our network's leadership, and began to build a process for evaluating, intentionally developing, and supporting high-potential individuals with executive coaching, training, and support. These changes began with our school-based leaders, now we are expanding this to develop additional leadership pathways.

A scalable structure of leadership begins with a newly created role of Instructional Leader. Each classroom teacher will have a direct leader invested in coaching and development for student outcomes. Instructional Leaders will be guided by the Assistant Principal of Instruction and supported by the Assistant Principal of Students. Each school will be led by a Principal - leading in the community, leading their school, and collaborating across the network.

In July of 2022, more than 50 leaders will gather for LEAD U. Each participant will leave LEAD U with expanded insights on leading by **looking up** (putting the work at hand in the context of the broader organization and community served), **looking out** (focusing on the current within the context of the long term), and **looking across** (identifying opportunities for collaboration and partnership – linking and aligning resources and output)

Leaders will leave LEAD U with a grounded optimism in their ability to lead and engage their team – knowing that they have unique skills and talents to lead in an authentic way AND access to support in resources within LEAD and their Authentic Impact Coach.

The tools are similar – but they are being delivered at LEAD U in a way most aligned to the Leaders' area of focus and impact. The sessions are designed to bring the groups together while also providing time for targeted development within leadership peer groups.

We will be developing a group of recently promoted internal leaders (33 Instructional Leaders, 8 Assistant Principals of Instruction, and 4 Principals). We invest in developing internal talent to fill leadership roles and then equip them with leadership training and support. Each newly placed leader will participate in a 6-month leadership development process – applying leadership development to the highest priority school outcomes.

### Leadership Development – Newly Placed Leaders

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As a result of the assessment, feedback, and focused coaching; the leader expands understanding, achieves higher levels of focus and results, and builds a solid foundation for future success.

### **Where We Are Headed (2023-2025): Ready for Growth**

Entering the calendar year 2023 we will have a leadership cadre of 50+ professionals leading the organization in a model that continues to build the pipeline of talent and allows LEAD to scale. We will utilize the leadership development pathways to focus on the development of leaders at each level of school leadership expanding our pool of resources for future growth.

Each July we will customize and deliver LEAD U to prepare leaders for the unique priorities of the coming year. LEAD U has evolved to be a key part of our approach to developing and preparing leaders and aligning across our growing network.

We will expand our talent calibration and succession planning down through the Instructional Leader role including assessment and development planning for the classroom teacher. We have created a system that supports talented teachers who wish to have a career in the classroom. No longer must our teachers leave the classroom to advance their pay. Utilizing the integrated set of talent management tools that have been designed, implemented, and refined since 2019 we have built a pipeline for talent and de-risked the talent component of our growth plans.

We will continue to follow a proven playbook and set of tools. We continue to invest in process of organizational sustainability, stimulating progress through innovation while preserving the core of LEAD. Increasingly roles are filled with ready-now internal talent while infusing the organization with targeted external talent. Externally hired talent is attracted and selected for cultural fit impacting success in the role and enhancing the organizational culture that delivers reliable student outcomes.

### Multi-Year Integrated Plan in Summary

2019	2020	2021
<ul style="list-style-type: none"> <li>▪ LEAD U – leadership university for leaders before the school year</li> <li>▪ Defined Employee Value Proposition</li> <li>▪ Teacher Compensation Plan               <ul style="list-style-type: none"> <li>✓ Performance-focused opportunity to rapidly advance base pay</li> </ul> </li> <li>▪ Leadership Behaviors defined and aligned to Ethos</li> <li>▪ Leadership Development               <ul style="list-style-type: none"> <li>✓ Assessment</li> <li>✓ 360° Feedback</li> <li>✓ Executive Coaching</li> </ul> </li> <li>▪ Crucial Conversations Training</li> </ul>	<ul style="list-style-type: none"> <li>▪ LEAD U – leadership university for leaders before the school year</li> <li>▪ Evolve teacher compensation plan including the elimination of stipends approach to pay</li> <li>▪ Performance-based compensation plan for non-teachers</li> <li>▪ Performance Management program integrating Ethos based leadership behaviors</li> <li>▪ Continued investment in deepening skills for effective communication and crucial conversations</li> <li>▪ Ongoing leadership development for senior leaders               <ul style="list-style-type: none"> <li>✓ Leading Change</li> <li>✓ Developing Talent</li> </ul> </li> <li>▪ Extended Leadership Development through Assistant Principal and Dean               <ul style="list-style-type: none"> <li>✓ Assessment</li> <li>✓ 360° Feedback</li> <li>✓ Executive Coaching</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ LEAD U – leadership university for leaders before the school year</li> <li>▪ Succession Planning               <ul style="list-style-type: none"> <li>✓ Principal thru CEO</li> </ul> </li> <li>▪ Talent review and calibration               <ul style="list-style-type: none"> <li>✓ Talent as an asset of the network</li> </ul> </li> <li>▪ Core competencies and leadership pathways               <ul style="list-style-type: none"> <li>✓ Assistant Principal, Dean, Operations Manager, Principal</li> </ul> </li> <li>▪ Training Plan               <ul style="list-style-type: none"> <li>✓ Customize ADP modules</li> <li>✓ Custom build modules</li> <li>✓ Aligned to key roles and leadership pathways</li> </ul> </li> <li>▪ Hire for Culture Fit &amp; Ethos Alignment               <ul style="list-style-type: none"> <li>✓ Tools &amp; Training</li> <li>✓ Candidate sourcing and selection</li> </ul> </li> <li>▪ Leadership Development for newly hired leaders               <ul style="list-style-type: none"> <li>✓ Assessment</li> <li>✓ 360° Feedback</li> </ul> </li> </ul>

		<ul style="list-style-type: none"> <li>✓ Executive Coaching</li> <li>▪ Individualized leadership development for senior leaders aligned to the Succession and Development Planning Process</li> </ul>
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2022	2023	2024/2025
<ul style="list-style-type: none"> <li>▪ LEAD U – leadership university for leaders before the school year. For 2022/2023 the largest leadership group assembled. 50+ leaders participating in integrated learning delivered to three targeted levels of leaders</li> <li>▪ Enhanced teacher compensation plan with an additional \$500K investment for increased starting pay, raising maximum to \$100K for Master Teachers and \$75K for teachers</li> <li>▪ Enhanced non-teacher compensation plan to 75<sup>th</sup> percentile market-based midpoints and a 5% merit budget.</li> <li>▪ Designed a new school-based leadership structure</li> <li>▪ Implemented leadership pathways and development plans</li> </ul>	<ul style="list-style-type: none"> <li>▪ LEAD U – leadership university for leaders before the school year</li> <li>▪ Implement new school leadership structure for 2022/2023 school – Instructional Managers providing coaching and leadership for classroom teachers while building leadership skills in a multi-level pipeline of leadership talent</li> <li>▪ Build leadership pipeline and deepen leadership expertise to prepare for network growth – ready now for school growth</li> <li>▪ Leadership Development for newly hired leaders <ul style="list-style-type: none"> <li>✓ Assessment</li> <li>✓ 360° Feedback</li> <li>✓ Executive Coaching</li> </ul> </li> <li>▪ Individualized leadership development for senior leaders</li> </ul>	<ul style="list-style-type: none"> <li>▪ LEAD U – leadership university for leaders before the school year</li> <li>▪ Leadership Development for newly hired leaders <ul style="list-style-type: none"> <li>✓ Assessment</li> <li>✓ 360° Feedback</li> <li>✓ Executive Coaching</li> </ul> </li> <li>▪ Individualized leadership development for senior leaders aligned to the Succession and Development Planning Process</li> <li>▪ Succession plans show talent depth for all leadership roles</li> <li>▪ LEAD leaders are impacting student outcomes at an expanded LEAD and in school systems across the United States</li> <li>▪ LEAD is an Employer of Choice in Nashville</li> </ul>

<ul style="list-style-type: none"> <li>▪ Focus on developing internal leaders with high rates of internal promotion. 100% of Principal hires for the 2022/2023 school year to be an internal promotion</li> <li>▪ Leadership Development for newly hired leaders <ul style="list-style-type: none"> <li>✓ Assessment</li> <li>✓ 360° Feedback</li> <li>✓ Executive Coaching</li> </ul> </li> <li>▪ Individualized leadership development for senior leaders aligned to the Succession and Development Planning Process</li> <li>▪ Focused talent acquisition with a differentiated employee value proposition – attracting ethos-aligned talent with growth potential</li> </ul>	<p>aligned to the Succession and Development Planning Process</p> <ul style="list-style-type: none"> <li>▪ Deepened pools of talent for critical roles</li> <li>▪ Achieving target retention rates of high-performing teachers and staff while achieving a reputation as talent developers</li> </ul>	
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