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**BEFORE THE TENNESSEE STATE BOARD OF EDUCATION**

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**IN RE:** )      **State Board of Education Meeting**  
**Beacon College Preparatory** )      **November 15, 2019**  
**Charter School Appeal** )  
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**FINDINGS AND RECOMMENDATION REPORT  
OF THE EXECUTIVE DIRECTOR**

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Pursuant to Tennessee Code Annotated (T.C.A.) § 49-13-108, sponsors proposing to open new charter schools may appeal the denial of their amended application by a local board of education to the State Board of Education (State Board). On September 27, 2019, Beacon College Preparatory Charter School (Beacon) appealed the denial of its amended application by Shelby County Schools (SCS) Board of Education to the State Board.

Based on the following procedural history, findings of fact, and Review Committee Report attached hereto, I believe that the decision to deny the Beacon amended application was “contrary to the best interests of the pupils, school district, or community.”<sup>1</sup> Therefore, I recommend that the State Board overturn the decision of SCS to deny the amended application for Beacon and that the State Board approve the amended application for Beacon.

**STANDARD OF REVIEW**

Pursuant to T.C.A. § 49-13-108 and State Board policy 2.500, State Board staff and an independent charter application review committee (Review Committee) conducted a de novo, on the record review of the Beacon amended application. In accordance with the Tennessee Department of Education’s charter application scoring rubric, “applications that do not meet or exceed the standard in all sections (academic plan design and capacity, operations plan and capacity, financial plan and capacity, and, if applicable, past performance) . . . will be deemed not ready for approval.”<sup>2</sup> In addition, the State Board is required to hold a public hearing in the district where the proposed charter school seeks to locate.<sup>3</sup>

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<sup>1</sup> T.C.A. § 49-13-108.

<sup>2</sup> Tennessee Charter School Application Evaluation Rubric – Ratings and Sample Scoring Criteria, pg. 1.

<sup>3</sup> T.C.A. § 49-13-108.

In order to overturn the decision of the local board of education, the State Board must find that the local board's decision to deny the charter application was contrary to the best interests of the students, LEA, or community.<sup>4</sup> Because Beacon is proposing to locate in a school district that contains a school on the current or last preceding priority school list, the State Board has the ability to approve the application, and thereby authorize the school, or to affirm the local board's decision to deny.

#### **PROCEDURAL HISTORY**

1. On February 1, 2019, the Sponsor, Beacon College Preparatory, Inc., submitted a letter of intent to SCS expressing its intention to file a charter school application.
2. The Sponsor submitted its initial application for Beacon to SCS on April 1, 2019. SCS assembled a review committee to review and score the Beacon application.
3. Shelby County Schools asked all sponsors to complete a supplement to the Tennessee Department of Education charter school application template in Section 1.2 – Enrollment by responding to Shelby County Schools' 2019 Regional Seats Analysis. This supplement was turned in with the initial application.
4. On May 6, 2019, a SCS panel, which included external expert reviewers, held a capacity interview with the Sponsor.
5. The review committee recommended denial of the Beacon initial application.
6. On June 25, 2019, the SCS Board of Education voted to deny the Beacon initial application based upon the review committee's recommendation.
7. The Sponsor amended and resubmitted its application for Beacon to SCS on July 26, 2019.
8. SCS's review committee reviewed and scored the Beacon amended application.
9. The Beacon amended application was recommended for denial based on achieving a "partially meets the standard" rating on Section 1.2 - Enrollment of the state scoring rubric. The SCS review committee found the application met or exceeded the standards of the state scoring rubric, however, this rating was given based on the regional seat analysis conducted by SCS pursuant to SCS Board Policy #1011 – Charter Schools. The policy states, "the district shall consider whether the establishment of a proposed charter school in a particular geographic location of the LEA is feasible or will create oversaturation in the proposed geographic location."
10. On September 17, 2019, based on the SCS staff recommendation to deny the amended application, the SCS Board of Education voted to deny the Beacon amended application.

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<sup>4</sup> Ibid.

11. The Sponsor appealed the denial of the Beacon amended application in writing to the State Board on September 27, 2019, including submission of all required documents per State Board policy 2.500.
12. At the time of appeal to the State Board, the Sponsor did submit proposed corrections to the application as allowed under T.C.A. § 49-13-108(b)(4). These proposed corrections were accepted.
13. The State Board’s Review Committee analyzed and scored the Beacon amended application using the Tennessee Department of Education’s charter application scoring rubric.
14. The State Board’s Review Committee conducted a capacity interview with the proposed governing board of Beacon and key members of the leadership team on October 30, 2019, in Nashville.
15. On November 4, 2019, the State Board staff held a public hearing in Memphis. At the public hearing, the Executive Director, sitting as the State Board’s designee, heard presentations from the Sponsor and SCS and took public comment regarding the Beacon amended application.
16. After the capacity interview, the Review Committee determined a final consensus rating of the Beacon amended application, which served as the basis for the Review Committee Recommendation Report.

**FINDINGS OF FACT**

- **District Denial of Application.**

The review committee assembled by SCS to review and score the Beacon initial and amended applications consisted of the following individuals:

Name	Title
Dr. Andrea Mayfield	Arrow Academy of Excellence (initial)
Rachel Ksneyak	National Association of Charter School Authorizers
Terinni Stafford	Shelby County Schools, Coordinated School Health (initial)
Kimberly Jackson	Shelby County Schools, Curriculum & Instruction
Abasi McKinzie	Shelby County Schools, English Language Learners
Dr. Pamela McKinley	Shelby County Schools, Exceptional Children
Leslie Knighten	Shelby County Schools, Finance (initial)
LaTonya Goodman	Shelby County Schools, Finance (amended)
Kendra Preston	Shelby County Schools, Human Resources
Dr. George Stewart	Shelby County Schools, Mental Health
Sean Isham	Shelby County Schools, Operations
Gina True	Shelby County Schools, Student Support
Dr. Angela Whitelaw	Shelby County Schools, Deputy Superintendent, Schools and Academic Support

Daphné Robinson	Shelby County Schools, Director of Office of Charter Schools (initial)
Brittany Monda	Shelby County Schools, Director of Office of Charter Schools (amended)
DeVonté Payton	Shelby County Schools, Advisor, School Development, Office of Charter Schools

The Beacon initial application received the following ratings from the SCS review committee:

Sections	Rating
Academic Plan Design and Capacity	PARTIALLY MEETS STANDARD
Operations Plan and Capacity	PARTIALLY MEETS STANDARD
Financial Plan and Capacity	PARTIALLY MEETS STANDARD

After the SCS review committee completed its review and scoring of the initial application, its recommendation was presented to the SCS Board of Education on June 25, 2019. Based on the review committee’s recommendation, the SCS Board of Education voted to deny the initial application of Beacon.

Upon resubmission, the amended application received the following ratings from the SCS review committee:<sup>5</sup>

Sections	Rating
Academic Plan Design and Capacity	PARTIALLY MEETS STANDARD
Operations Plan and Capacity	MEETS OR EXCEEDS STANDARD
Financial Plan and Capacity	MEETS OR EXCEEDS STANDARD

After the SCS review committee completed its review and scoring of the amended application, its recommendation was presented to the SCS Board of Education on September 17, 2019. Although the SCS administration stated that the Beacon amended application met or exceeded all standards on the state’s scoring rubric, SCS stated the application did not meet the supplemental requirements of the regional seat analysis and therefore was rated as only partially meeting the standard in section 1.2 of the application. Because of this, the amended application was recommended for denial based on a regional seat analysis conducted by SCS pursuant to SCS Board Policy #1011 – Charter Schools. Based on this recommendation, the SCS Board of Education voted to deny the amended application of Beacon.

- **State Board Charter Application Review Committee’s Evaluation of the Application**

Following the denial of the Beacon amended application and their subsequent appeal to the State Board, State Board staff assembled a diverse Review Committee of experts to evaluate and score the Beacon amended application. This Review Committee consisted of the following individuals:

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<sup>5</sup> Please see **Exhibit B** for a copy of the SCS review committee report.

Name	Title
Samuel Brobeck	Independent Consultant
Leigh Cummins	Independent Consultant
Catherine Johnson	Policy Coordinator, Tennessee State Board of Education
Jason Roach	Principal, Mooresburg Elementary School
Tess Stovall	Director of Charter Schools, Tennessee State Board of Education

The Review Committee conducted an initial review and scoring of the Beacon amended application, a capacity interview with the Sponsor, and a final evaluation and scoring of the amended application resulting in a consensus rating for each major section. The Review Committee’s consensus rating of the Beacon amended application was as follows:

Sections	Rating
Academic Plan Design and Capacity	MEETS OR EXCEEDS STANDARD
Operations Plan and Capacity	MEETS OR EXCEEDS STANDARD
Financial Plan and Capacity	MEETS OR EXCEEDS STANDARD

The Review Committee recommended that the application for Beacon be approved because the applicant provided detailed evidence in the academic, operational, and financial sections that the application meets the required criteria of the rubric. The applicant’s mission and vision are clear and infused throughout the academic plan. The academic plan is detailed and based on successful academic programs from within the Building Excellent Schools fellowship network, and the applicant has a detailed plan for the use of assessments and data and a strong description of family and community engagement. The applicant’s operational plan meets the standard because of a strong governance structure, detailed facility plans, robust start-up plans, and a comprehensive plan to hire and support teachers. Finally, the financial plan contained within the application meets the standard because the applicant has documented commitment for start-up funds, a complete and detailed budget, and realistic budget assumptions. The applicant also demonstrates the capacity to make budget adjustments as necessary and provides thoughtful contingency plans. In totality, the review committee found complete and compelling evidence of a high quality application with a high capacity school leader and governing board who have a strong likelihood of implementing the plan with fidelity. Therefore, the Review Committee recommended that the Beacon amended application be approved.

For additional information regarding the Review Committee’s evaluation of the application, please see **Exhibit A** for the complete Review Committee Report, which is fully incorporated herein by reference.

- **Public Hearing**

Pursuant to statute<sup>6</sup> and State Board policy 2.500, a public hearing chaired by the Executive Director was held in Memphis on November 4, 2019. SCS’s presentation at the public hearing focused on

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<sup>6</sup> T.C.A. § 49-13-108(b)(4).

the argument that the denial of the Beacon amended application was in the best interests of the students, LEA, and community. SCS grounded its argument in SCS Board Policy #1011 – Charter Schools, which requires applicants to demonstrate a community need by addressing one of three options: academic underperformance of area schools, over enrollment of schools in an area, or new programmatic options. SCS stated that all charter school applicants were required to complete a supplement to the charter school application where sponsors were asked to address how the proposed school met community needs. As a part of its rationale for denial of the Beacon amended application, SCS stated that 32% of the charter schools (18 of 56) in Memphis are at least 30% below the enrollment capacities listed in their applications, and the SCS 2019 regional seat analysis was an additional tool to analyze the best interests of the community. Using its regional seats analysis, SCS stated that the applicant did not meet any of the three criteria as there are over 600 unfilled seats, both in traditional public schools and charter schools, in the north region of the city, which includes the neighborhoods of both Frayser and Raleigh. Because of the oversaturation in the Raleigh area, the intended location of the school, SCS stated that Beacon could not demonstrate a community need, and therefore, the application was denied. When asked if the SCS Board of Education was aware of the State Board rule 0520-14-01-.01 that prohibits districts from denying charter school applications for failure to address additional priorities, SCS stated the Board was aware of this rule. However, SCS stated that the Board hoped the State Board would consider oversaturation as a “lens through which the [district’s] charter review team reads Section 1.2 – Enrollment.” SCS further stated that “the application of the Board Policy #1011 through the use of the regional seats analysis guided the review of the applicant’s rationale and the community’s need.”

In response to SCS’s argument, the Sponsor stated that their application does meet the needs of the community because it would provide a high-quality school option in the Raleigh area of Memphis. The Sponsor pointed out that the supplement to the charter application included addressing a region’s academic underperformance as one of three ways that a sponsor could demonstrate that it will meet the needs of the community. As such, the Sponsor presented evidence that 73% of the elementary schools in the Raleigh area failed to achieve a “good” rating on the district’s school performance scorecard in 2017-18, and 2,645 more high quality seats are needed in the Raleigh area. The Sponsor stated that the proposed school would provide a challenging curriculum using resources from high-quality charter schools already established in the state, strong community engagement, and a supportive environment for students. The Sponsor detailed that they had identified two (2) strong facility options for the school, and they had already made budget adjustments to ensure they have multiple contingency plans in place.

A portion of the public hearing was dedicated to taking public comment. A total of two (2) members of the community made verbal comments in support of Beacon at the hearing. In addition, the State Board received eleven (11) written public comments in support of Beacon’s amended application.

- **Alignment of Shelby County Schools’ Application Process to State Board Quality Authorizing Standards**

State Board staff collected and analyzed detailed information regarding SCS’s application review process to determine alignment with State Board Quality Authorizing Standards as set forth in State Board policy 6.111. At the public hearing, State Board staff questioned SCS regarding its authorization process

and alignment to the Quality Authorizing Standards. SCS articulated that its application process is fair, transparent, and focused on quality with rigorous criteria for approval. As evidence of this, SCS pointed to their use of the State Charter Application, the formation of a review committee made up of both internal and external experts trained on the process to evaluate each application, and hosting a capacity interview with every applicant to ensure a fair review. Additionally, SCS highlighted their use of informational sessions for applicants as a means to increase transparency in their process. Based on the information presented by SCS, this part of the district's process appears in alignment with State Board Quality Authorizing Standards.

However, SCS stated that the SCS Board of Education was aware of the State Board's rule prohibiting using an applicant's failure to address a district's additional priorities as a reason for denial, but the Board proceeded with the denial of the Beacon amended application, at least in part, because of failing to address the additional priority. This decision making process does not align with the Quality Authorizing Standard that states, "a quality authorizer makes authorizer decisions that will result in positive student outcomes, in accordance with state law."

### **ANALYSIS**

State law requires the State Board to review the decision of the local board of education and determine whether the denial of the proposed charter school was in the "best interests of the students, LEA, or community."<sup>7</sup> In addition, pursuant to T.C.A. § 49-13-108, the State Board adopted Quality Charter Authorizing Standards set forth in State Board policy 6.111, and utilizes these standards to review charter applications received upon appeal. One such standard is to maintain high but attainable standards for approving charter applications. In making my recommendation to the Board, I have considered the Review Committee Report, the documentation submitted by both the Sponsor and SCS, the arguments made by both the Sponsor and SCS at the public hearing, and the public comments received by State Board staff and conclude as follows:

The Review Committee's report and recommendations are thorough and cite specific examples in the application and reference information gained at the capacity interview in support of its findings. For the reasons explicated in the report, I agree that the Beacon amended application did meet or exceed the standards required for approval.

Pursuant to State Board Rule 0520-14-01-01 Approval of a Charter School, a local board of education may ask sponsors to address additional priorities as a means of evaluating the best interests of the students, LEA, or community. However, "chartering authorities may not deny or refuse to review an application for failing to address additional priorities." At the public hearing, SCS officials acknowledged that applicants were asked to complete a supplement to the state's application in Section 1.2 – Enrollment to demonstrate community need, per SCS Board Policy #1011 – Charter Schools. Furthermore, SCS confirmed that the application was recommended for denial on the basis that it did not meet the additional SCS regional seat analysis priority contained in SCS Board Policy #1011 – Charter Schools. Based on the information collected, the regional seat analysis priority contained in SCS Board Policy #1011 –

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<sup>7</sup> T.C.A. § 49-13-108.

Charter Schools is an additional priority outside of the state scoring rubric and application, and pursuant to State Board rules, was not a permissible reason for SCS to deny Beacon's application.

Given the great responsibility of educating students and the amount of public funds entrusted to a charter school that is approved by a local district, the State Board expects that only those schools that have demonstrated a high likelihood of success and meet or exceed the required criteria in all areas will be authorized. It is readily apparent that the Sponsor has assembled a highly capable board and staff with a passion for students and dedication to the community. Beacon would locate in an area of Memphis that SCS's regional seats analysis acknowledges is in need of additional high quality seats. Beacon's ability to meet a community need and achieve their enrollment projections were evaluated by the State Board's Review Committee through the state scoring rubric. Section 1.2 of the rubric requires applicants to provide evidence of how the school will serve as a needed alternative in the community. Here, the Sponsor provided a persuasive case for an additional elementary charter school option in the Raleigh neighborhood through a description of the low academic performance of most of the area's current elementary schools. Further, Section 1.11 – Marketing, Recruitment, and Enrollment requires applicants to provide a "compelling student outreach plan" and a "description of existing community resources and partnerships". The Sponsor provided a detailed, month-by-month recruitment strategy to ensure it meets its enrollment projections and provided numerous letters of support from community organizations with which they have already established partnerships.

Furthermore, the Sponsor presented a strong, detailed, and clear academic plan that is based on the success of existing charter schools in Tennessee. The Sponsor has established partnerships with existing high quality charter schools currently operating in Tennessee, and these partnerships will allow the school to gain access to curriculum resources that have already proven to be successful in practice. The Sponsor's proposed head of school is a Building Excellence Schools (BES) fellow who will receive support from the organization for the first four years the school is in operation. Moreover, the proposed governing board will receive training and support from BES during its first year of governance. This strong partnership with a national organization provides evidence of the likelihood of success for the proposed school. The Beacon amended application had a strong description of the proposed school's culture, which was inclusive of students, families, and staff. There is clear evidence that the amended application is thoughtful, well-researched, detailed, and based on community need. Therefore, I agree with the Sponsor that there is a need for this type of school in the Raleigh community, and the Beacon amended application meets the high but attainable bar for approval.

### **CONCLUSION**

For these reasons, and for the reasons stated in the Review Committee Report attached hereto, I do believe that the decision to deny the amended application for Beacon College Preparatory Charter School was contrary to the best interests of the students, the LEA, or the community. Therefore, I recommend that the State Board overturn the decision of SCS to deny the amended application for Beacon College Preparatory Charter School and approve the amended application.





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Dr. Sara Morrison, Executive Director  
State Board of Education

11/12/2019

Date



EXHIBIT A

**Charter Application Review Committee Recommendation Report**

**November 8, 2019**

School Name: Beacon College Preparatory Charter School

Sponsor: Beacon College Preparatory, Inc.

Proposed Location of School: Shelby County Schools

Evaluation Team:

Samuel Brobeck  
Leigh Cummins  
Catherine Johnson  
Jason Roach  
Tess Stovall

This recommendation report is based on a template from the National Association of Charter School Authorizers.



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## Introduction

Tennessee Code Annotated (T.C.A.) § 49-13-108 allows the sponsor of a public charter school to appeal the denial of an application by the local board of education to the State Board of Education. In accordance with T.C.A. § 49-13-108, the State Board of Education shall conduct a de novo, on the record review of the proposed charter school's application, and the State Board of Education has adopted national and state authorizing standards. As laid out in State Board policy 6.200 - Core Authorizing Principles, the State Board is committed to implementing these authorizing standards that are aligned with the core principles of charter school authorizing, including setting high standards for the approval of charter schools in its portfolio.

In accordance with T.C.A. § 49-13-108, the State Board adopted State Board policy 6.111 - Quality Charter Authorizing Standards. The State Board has aligned the charter school appeal process to these high standards to ensure the well-being and interests of students are the fundamental value informing all State Board actions and decisions. The State Board publishes clear timelines and expectations for applicants, engages highly competent teams of internal and external evaluators to review all applications, and maintains rigorous criteria for approval of a charter school. Annually, the State Board evaluates its work to ensure its alignment to national and state standards for quality authorizing and implements improvement when necessary.

The State Board of Education's charter application review process is outlined in T.C.A. § 49-13-108, State Board policy 2.500 – Charter School Appeals, and State Board policy 6.300 – Application Review. The State Board assembled a charter application review committee comprised of highly qualified internal and external evaluators with relevant and diverse expertise to evaluate each application. The State Board provided training to all review committee members to ensure consistent standards and fair treatment of all applications.

## Overview of the Evaluation Process

The State Board of Education's charter application review committee developed this recommendation report based on three key stages of review:

1. **Evaluation of the Proposal**: The review committee independently reviewed the amended charter application, attachments, and budget submitted by the sponsor. After an independent review, the review committee collectively identified the main strengths, concerns, and weaknesses as well as developed specific questions for the applicant in the three sections of the application: Academic Plan Design and Capacity, Operations Plan and Capacity, and Financial Plan and Capacity.
2. **Capacity Interview**: Based on the independent and collective review of the application, the review committee conducted a 90-minute in-person interview with the sponsor, members of the proposed governing board, and identified school leader (if applicable) to address the concerns, weaknesses, and questions identified in the application, and to assess the capacity to execute the application's overall plan.

3. Consensus Judgment: At the conclusion of the review of the application and the capacity interview, the committee submitted a final rubric and developed a consensus regarding a rating for each section of the application.

This recommendation report includes the following information:

1. Summary of the application: A brief description of the applicant's proposed academic, operations, and financial plans.
2. Summary of the recommendation: A brief summary of the overall recommendation for the application.
3. Analysis of each section of the application: An analysis of the three sections of the application and the capacity of the team to execute the plan as described in the application.
  - a. Academic Plan Design and Capacity: school mission and goals; enrollment summary; school development; academic focus and plan; academic performance standards; high school graduation standards (if applicable); assessments; school schedule; special populations and at-risk students; school culture and discipline; marketing, recruitment, and enrollment; community involvement and parent engagement; and the capacity to implement the proposed plan.
  - b. Operations Plan and Capacity: governance; start-up plan; facilities; personnel/human capital; professional development; insurance; transportation (if applicable); food service; additional operations (if applicable); waivers; and the capacity to implement the proposed plan.
  - c. Financial Plan and Capacity: budget narrative; budget; cash flow projections; related assumptions; financial policies and procedures; and the capacity to implement the proposed plan.

The State Board's charter application review committee utilized the Tennessee Department of Education's Charter School Application Evaluation Ratings and Sample Scoring Criteria (the rubric), which is used by all local boards of education when evaluating an application. The rubric states:

An application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to operate; be detailed in how this school will raise student achievement; and inspire confidence in the applicant's capacity to successfully implement the proposed academic and operational plans. In addition to meeting the criteria that are specific to that section, each part of the proposal should align with the overall mission, budget, and goals of the application.

The evaluators used the following criteria and guidance from the scoring rubric to rate applications:

<b>Rating</b>	<b>Characteristics</b>
Meets or Exceeds Standard	The response reflects a thorough understanding of key issues. It clearly aligns with the mission and goals of the school. The response includes specific and accurate information that shows thorough preparation.
Partially Meets Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.
Does Not Meet Standard	The response is significantly incomplete; demonstrates lack of preparation; is unsuited to the mission and vision of the district or otherwise raises significant concerns about the viability of the plan or the applicant's ability to carry it out.

## Summary of the Application

School Name: Beacon College Preparatory Charter School

Sponsor: Beacon College Preparatory, Inc.

Proposed Location of School: Shelby County Schools

Mission:<sup>1</sup> With an academically rigorous, purposefully structured, joyful community, Beacon College Preparatory Charter School prepares all kindergarten through fifth grade scholars to succeed in college and contribute positively in their communities.

Number of Schools Currently in Operation by Sponsor: 0

Proposed Enrollment:<sup>2</sup>

Grade Level	Year 1 (2020)	Year 2 (2021)	Year 3 (2022)	Year 4 (2023)	Year 5 At Capacity (2024)
<b>K</b>	60	60	60	60	60
<b>1</b>	60	60	60	60	60
<b>2</b>	0	60	60	60	60
<b>3</b>	0	0	60	60	60
<b>4</b>	0	0	0	60	60
<b>5</b>	0	0	0	0	60
<b>Total</b>	<b>120</b>	<b>180</b>	<b>240</b>	<b>300</b>	<b>360</b>

### Brief Description of the Application:

Beacon College Preparatory, Inc. is proposing to open an elementary school in the Raleigh area of Memphis, Tennessee and serve students in Kindergarten through 5<sup>th</sup> grades.<sup>3</sup> The school, Beacon College Preparatory Charter School (Beacon), is a new-start school, and the school will focus on providing a rigorous curriculum, a strong school culture, and extensive community partnerships to the Raleigh community.

The proposed school will be organized under the existing non-profit entity of Beacon College Preparatory, Inc., and the Sponsor projects the school will have \$355,000 in revenue and \$311,050 in expenses in Year 0, resulting in a positive ending balance of \$43,950. The application projects the school will have \$1,398,760 in revenue and \$1,337,124 in expenses in Year 1, resulting in a net income of \$61,636 and a positive ending fund balance of \$105,587. By Year 5, the school projects to have \$3,539,281 in revenue and \$3,055,151 in expenses, resulting in a net income of \$484,130 and a positive ending fund balance of \$1,034,991.<sup>4</sup> The school anticipates that 70% of the student population will qualify as

<sup>1</sup> Beacon College Preparatory Charter School Amended Application, pg. 4.

<sup>2</sup> Ibid., pg. 29.

<sup>3</sup> Ibid., pg. 22

<sup>4</sup> Ibid., Attachment O-Planning and Budget Worksheet.



economically disadvantaged, 11% of the student population will be students with disabilities, and 5% of the student population will be English Learners.<sup>5</sup>

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<sup>5</sup> Ibid. pg. 29.





## Summary of the Evaluation

The review committee recommends that the application for Beacon be approved because the applicant provided detailed evidence in the academic, operational, and financial sections that the application meets the required criteria of the rubric. The applicant’s mission and vision are clear and infused throughout the academic plan. The academic plan is detailed and based on successful academic programs from existing charter schools, and the applicant has a detailed plan for the use of assessments and data and a strong description of family and community engagement. The applicant’s operational plan meets the standard because of a strong governance structure, detailed facility plans, robust start-up plans, and a comprehensive plan to hire and support teachers. Finally, the financial plan contained within the application meets the standard because the applicant has documented commitment for start-up funds, a complete and detailed budget, and realistic budget assumptions. The applicant also demonstrates the capacity to make budget adjustments as necessary and provides thoughtful contingency plans. In totality, the review committee found significant evidence of a high-quality application with high-capacity individuals who have a strong likelihood of implementing the plan with fidelity.

### Summary of Section Ratings

In accordance with the Tennessee Department of Education’s charter application scoring rubric, “applications that do not meet or exceed standard in every area...will be deemed not ready for approval,”<sup>6</sup> and strengths in one area of the application do not negate material weaknesses in other areas. Opening and maintaining a successful, high-performing charter school depends on having a complete, coherent plan and identifying highly capable individuals to execute that plan. The review committee’s consensus rating for each section of the application are as follows:

<b>Sections</b>	<b>Rating</b>
Academic Plan Design and Capacity	Meets or Exceeds Standard
Operations Plan and Capacity	Meets or Exceeds Standard
Financial Plan and Capacity	Meets or Exceeds Standard

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<sup>6</sup> Tennessee Charter School Application Rubric – Evaluation Ratings and Sample Scoring Criteria, pg. 1.

## **Analysis of the Academic Plan Design and Capacity**

*Rating: Meets or Exceeds Standard*

### **Strengths Identified by the Committee:**

The applicant's Academic Plan Design and Capacity meets or exceeds standard because its mission and vision are clear and infused throughout the academic plan. The academic plan is detailed and based on successful academic programs from within the Building Excellent Schools fellowship network, and the applicant has a detailed plan for the use of assessments and data and a strong description of family and community engagement.

The application has a clear mission and vision that is infused through the academic plan. All aspects of the plan clearly tie back to the purpose of providing a rigorous academic program built on strong culture and community engagement. The applicant provides detailed descriptions of the planned instructional strategies and curriculum as well as the plans to leverage the resources and experience of existing high-quality charter operators in the state. Furthermore, the applicant outlines clear and measurable goals that they will use to track progress of students and the school, which is critical prior to school year 2022-2023 when the students take state assessments. The goals are broken down to include absolute performance, comparative performance, and growth performance of students which clearly demonstrates a keen understanding of the different ways to measure student academic performance.

Furthermore, the applicant includes a robust description of their planned assessments and use of data to drive instruction. Across each subject area, the applicant describes the interim assessments that will be used to track student progress, the rationale for selecting those assessments, and whether the assessments will be developed internally or externally. Moreover, the applicant provides a comprehensive list of its assessment program, the frequency of the assessments, and the use of the data from the assessments. The applicant also has a thorough description of how the school will use the data to support instruction through weekly coaching session with teachers, weekly professional development on Wednesdays, and quarterly data days.

The application contains a clear plan to support special populations while also understanding that their plans may need to shift depending on the actual students who enroll. The applicant plans to hire a Scholar Supports Coordinator in Year 1 and 2 to support the projected population of students with disabilities. Additionally, the application includes a chart (pg. 91) of how the special education department will grow with the projected student population. This demonstrates clear evidence of a thoughtful and realistic plan to serve students with disabilities. Moreover, the applicant plans to have one English Learner (EL) teacher per grade level, but also acknowledges in the application and the capacity interview that it would need to assess the needs of the student population who enroll. The applicant states they have contingency plans in place if the school's EL student population is higher than projected. The applicant also presents a strong plan for developing and sustaining school culture that is inclusive of students, staff, and families. The applicant plans to utilize a character development curriculum that is grounded in the school's values, and the applicant's school culture aligns with their approach to student discipline.

The application has a robust, detailed, and well-researched recruitment plan for the school as well as a detailed description of the rationale for selecting the proposed neighborhood. The applicant states that they have held regular information sessions since February 2019 and have already developed key community partnerships, which is evidenced by numerous letters of community support. Additionally, the application contains an extremely detailed recruitment plan including a timeline and clear benchmarks to use to track its student enrollment efforts. In totality, the review committee found clear and compelling



evidence that the academic program described in the application had a strong likelihood of success and the proposed school has the capacity to implement the program with fidelity.

## **Analysis of the Operations Plan and Capacity**

*Rating: Meets or Exceeds Standard*

### **Strengths Identified by the Committee:**

The applicant's Operations Plan and Capacity meets or exceeds standard because of a strong governance structure, detailed facility plans, robust start-up plans, and a comprehensive plan to hire and support teachers.

In the application, the applicant provides details on a strong proposed governing board for the school which includes individuals with a variety of backgrounds and experience. During the capacity interview, the proposed governing board members provided thoughtful responses on how they plan to provide oversight and monitoring of the school, support the school leader, and track progress toward the school's goals. Additionally, the school's governing board will have coaching and support available during its first year in operation through the school leader's partnership with Building Excellent Schools (BES). This partnership will allow the governing board to gain access to support and resources to ensure a successful beginning of the school. Additionally, the applicant describes a detailed and robust start-up plan for the school. The school leader and dean of operations are projected to be hired during Year 0 to support the recruitment and start-up operations. The start-up plan has detailed timelines and benchmarks for the school to use to track progress and provides evidence of a strong likelihood of a successful start. Moreover, the applicant provides confirmation of a start-up grant worth \$325,000 that it will receive from the Walton Family Foundation to support the start-up year activities.

The applicant also describes three potential facility locations, and in the capacity interview, the applicant provided further details on these options. The applicant stated that two of the options are their preferred choices because of the locations and the low renovation needs necessary. The applicant identified their first priority which is a building currently occupied by another charter school which serves middle and high school students in the area, and the applicant explained that they had already had conversations with the current school to take over the facility as the school moves into a new building. The description of the facility plans both in the application and in the interview provides evidence of a realistic and detailed plan to obtain a suitable facility in the pre-opening year.

The applicant provides a staffing structure and hiring plan that demonstrates a clear understanding of the needs to execute the proposed academic plan and a thoughtful approach to supporting teachers. The proposed head of school is a Building Excellent Schools (BES) fellow and has participated in significant leadership training through this program. Additionally, BES will provide ongoing coaching and support to the school leader at no cost to the school for the first four years the school is in operation. In terms of staffing beyond the school leader, the applicant provides a detailed timeline to recruit key staff including instructional staff and administrative staff and details partnerships that have already been established to support teacher recruitment with organizations such as Relay Memphis, Teach for America, and The New Teacher Project. Moreover, the application contains a detailed plan to support teachers through seventeen (17) days of professional development prior to the beginning of the school year, abbreviated Wednesdays each week to allow for team meetings and co-planning, quarterly Data Days to review and analyze data, and weekly coaching. While the review committee recognizes the significant demands that will be on all staff during the first few years of operation of the school, the committee found sufficient evidence of a thoughtful and well-developed plan to recruit, hire, and support



its staff. In totality, the review committee found a detailed and strong operations plan to support the proposed school.

## **Analysis of the Financial Plan and Capacity**

*Rating: Meets or Exceeds the Standard*

### **Strengths Identified by the Committee:**

The Financial Plan and Capacity meets or exceeds standard because the applicant has documented commitment for start-up funds, a complete and detailed budget, and realistic budget assumptions. The applicant also demonstrates the capacity to make budget adjustments as necessary and provides thoughtful contingency plans.

The applicant states that the school will receive \$325,000 through the Walton Family Foundation for the start-up year, and the application contains a letter of confirmation for this revenue source. This accounts for over 90% of the projected revenue in Year 0 and is clear evidence of the financial capacity to meet its needs in the start-up year. The pre-opening year budget includes the hiring of the school leader and the director of operations which aligns with the start-up plan presented in the application. The Year 0 budget expenditures also include costs for recruitment of students and staff, professional development, technology, and facilities, which demonstrates an understanding of the needs of the school prior to opening.

The budget and corresponding budget narrative for Years 1 through 5 are extremely detailed and well-researched and provide evidence of a strong financial understanding of school operations. The applicant provides thoughtful and realistic revenue projections for BEP, transportation, and capacity outlay, and the enrollment projections in the budget align with the enrollment projections in the application. The budget assumptions include projected costs for all necessary expenditures for school operations, and the applicant stated in the capacity interview that they had run several contingency models based on different scenarios.

The applicant plans to hire a third-party vendor to support in back-office operations such as payroll, vendor payment, and accounting, and the proposed governing board stated that they are actively recruiting an additional board member to support in the area of financial oversight. The applicant recognizes both in the application and in the capacity interview the need for conservative budget planning in anticipation of an unplanned expenditure. The applicant provides a thoughtful description in the application regarding the proposed contingency plans, and the proposed governing board expressed a keen understanding of a need to be thoroughly engaged in the finances of the school, especially in the first years of operations. Altogether, the application presents a clear, detailed, well-documented budget that is based on reasonable revenue and budget assumptions. The applicant has secured start-up revenue to support the school in Year 0, and it has demonstrated the capacity to implement the financial plan described in the application.



## Evaluation Team

**Samuel Brobeck** is currently pursuing his Master's in Education with a focus on Education Policy and Management at Harvard University. Prior to enrolling in graduate school, he served as the 8<sup>th</sup> Grade Math and Algebra 1 teacher at Grizzlies Prep, a public charter middle school in Memphis, Tennessee. Additionally, Sam served as the Chair of the Math Department at Grizzlies Prep. He was a 2018-2019 SCORE Tennessee Educator Fellow and previously served as a mentor teacher through Memphis Teacher Residency, a Policy Fellow with Stand For Children, and an Aspiring School Leader Fellow with TFA—Memphis. Sam graduated from Rhodes College with a Bachelor of Arts degree in Political Economy and Urban Studies.

**Leigh Cummins** was formerly the Policy and Research Analyst for the Tennessee State Board of Education, supporting both the charter appeals and standards review processes. Prior to the State Board, Leigh worked at the Tennessee Department of Education, supporting the development and implementation of teacher professional development within the Division of Curriculum and Instruction. She also previously served as an AmeriCorps VISTA at the University of Mississippi, coordinating a support program for first-year, at-risk college students. Leigh earned her B.A. at the University of Mississippi and her M.Ed. at Vanderbilt University.

**Catherine Johnson** serves as the Policy Coordinator for the Tennessee State Board of Education. In this role, she coordinates the review and revision process of the state academic standards as well as supporting the review process of all board items, policies, and rules. Prior to joining the State Board staff, Catherine was an 8<sup>th</sup> grade social studies teacher in Nashville at Apollo Middle School as a 2016 Teach for American Corps Member and then LEAD Southeast Middle School. Catherine has a Bachelor of Science in Secondary Social Studies Education and a Master of Arts in Educational Theory and Policy from Pennsylvania State University.

**Jason Roach** has served as an educator in the state of Tennessee for 10 years. Upon graduating from Carson-Newman College, he worked at Lincoln Heights Middle School in Morristown, Tennessee as a 7<sup>th</sup> and 8<sup>th</sup> grade social studies teacher. During the last standards review process for social studies, he served as a Governor Haslam appointee to the Social Studies Standards Recommendation Committee of which he also acted as Chairman. Currently, he serves as the principal of Mooresburg Elementary School in the Hawkins County School District. He and his family live in Rogersville, Tennessee.

**Tess Stovall** serves as the Director of Charter Schools for the Tennessee State Board of Education. In this role, she manages the charter school application process and authorization duties of the State Board, and she was a member of the 2015 National Association of Charter School Authorizer's Leaders Program. Prior to joining the staff of the board, she served as the Transformation Facilitator at Cameron Middle School, the first district-led conversion of a traditional public school to a charter school in Metropolitan Nashville Public Schools. While in Washington, DC, Tess worked for Congressman Jim Cooper (TN-05) and a centrist think tank, Third Way, on economic and education policy. She is a Phi Beta Kappa graduate of The George Washington University earning a Bachelor of Arts Degree in Political Science and Sociology and a graduate of the London School of Economics with a Master of Science Degree in Political Sociology.



## Exhibit B

# Beacon College Preparatory

Review Committee Recommendation: **Deny**

Proposed School Name	Proposed School Focus	Proposed Region/Location
Beacon College Preparatory	College Preparatory K-5	Raleigh Area

### School Mission

Within an academically rigorous, purposefully structured, joyful community, Beacon College Preparatory Charter School prepares all kindergarten through fifth grade scholars to succeed in college and contribute positively to their communities.

### School Plan Summary

Beacon College Prep believes strongly in the power of the community-school relationship and our ambitious K-5 mission. The vision of success is based on these two premises. Currently in the Raleigh neighborhood, just over 1 in 10 students can successfully read and compute math on grade level. In alignment with Shelby County Schools' *2017 Annual Report on Destination 2025*, we firmly believe that "students' success with early literacy sets the stage for their success throughout their academic career and beyond. Students who are proficient readers at the end of third grade are four times more likely to graduate from high school than their non-proficient peers." As a proposed public charter school, Beacon College Prep will serve all learners regardless of race, socioeconomic status, previous achievement, learning disability, English proficiency, or zip code. We intend to provide all of our scholars with the skills and knowledge necessary for success in middle school, and to put every scholar on the path to high school and college graduation. We have selected to propose in the community of Raleigh to educate scholars who currently lack access to high-quality elementary school options in their local neighborhood.

### Leadership and Governance

Full Name	Current Job Title and Employer	Position with Proposed School
Joseph Bolduc	Fellow, Building Excellent Schools	Head of School
Bailey Cato	Partner, New Teacher Project	Board Chair, Governance Committee, Academic Achievement Committee
Chandra Madison	Attorney, Broyle Brasher, LLC	Secretary, Governance Committee
Aubrey Nelson	Dean, Relay Graduate School of Education	Board Member, Academic Committee
Christopher Owens	Market Director, South Region, St. Jude Research Hospital - ALSAC	Treasurer, Finance Committee
Christopher Peck	Retired, previously CEO, ACE Awareness Foundation	Vice Chair, Finance Committee, Governance Committee
Patrice Pritchett	Clinical Staff Pharmacist, Baptist Memorial Hospital, Memphis	Board Member, Academic Achievement Committee
Jennifer Rich	Manager, HR Quality – Fed Ex Freight	Board Member, Finance Committee
Kirbi Tucker	Coordinator for Graduate Recruitment, University of Memphis, College of Education	Board Member, Academic Achievement

### Proposed Grade Structure and 5-year Enrollment Projections

Academic Year	Planned # of Students	Grades Served
2020-2021	108	K-1
2021-2022	162	K-2
2023-2024	216	K-3



2024-2025	270	K-4
2025-2026	324	K_5

## Application Ratings and Comments by Section

This section should include a summary of comments from all reviewers.

Section/Rating	Strengths/Highlights	Concerns/Areas for Improvement
<p><b>Academic Plan Design and Capacity</b></p> <p><input type="checkbox"/> Meets or Exceeds</p> <p><input checked="" type="checkbox"/> <b>Partially Meets</b></p> <p><input type="checkbox"/> Does Not Meet</p>	<p>Beacon’s mission statement defined the purpose, and the mission was clear and concise. Based on the plan, the goals were aligned to the mission. The mission and vision are supported by 4 core principles: <i>academic rigor leads to college readiness, structure and joy foster growth, our communities matter, and excellent teaching drives excellent results.</i> The plan noted a clear description of the community where the school intends to draw students including school zones and academic performance of surrounding schools. The school and student schedules meet Tennessee minimum requirements of the equivalent of 180 days of instruction. The plan gave a detailed description of a typical day for teachers and students align with key priorities of the academic plan and the overall mission and vision for the school.</p> <p>The plan was clear and the plan informed parents of school policies. The plan noted effective strategies for informing parents and the community about the school’s development.</p>	<p>Per SCS Board Policy #1011, Section VI, B. 5 – “the district shall consider whether the establishment of a proposed charter school in a particular geographic location of the LEA is feasible or will create oversaturation in the proposed geographic location.” According to the most recent strategic regional analysis, the North Region, inclusive of the Raleigh community has a current student capacity of 5,067 seats in K-5, with 4,390 students. This means that Raleigh is over-saturated by 677 seats.</p>
<p><b>Operations Plan and Capacity</b></p> <p><input checked="" type="checkbox"/> <b>Meets or Exceeds</b></p> <p><input type="checkbox"/> Partially Meets</p> <p><input type="checkbox"/> Does Not Meet</p>	<p>The plan noted a strong understanding of roles and responsibilities of a governing board. The plan noted plans for meaningful training as required by law. The plan outlines a process for parents having access to the governing board, including a process for complaints. The plan provided comprehensive and adequate insurance coverage. The insurance letter is attached. The facility plans are reasonable and adequately meet the requirements of the educational program and anticipated student population.</p> <p>The start-up plan included the identification of a capable individual and team to lead the planning start-up. The plan adequately addressed potential challenges. The plan also indicated a detailed start up plan specifying tasks and timelines.</p> <p>The plan outlined a detailed description of waivers, and plan also demonstrated an understanding of rules and statutes.</p>	
<p><b>Financial Plan and Capacity</b></p> <p><input checked="" type="checkbox"/> <b>Meets or Exceeds</b></p> <p><input type="checkbox"/> Partially Meets</p> <p><input type="checkbox"/> Does Not Meet</p>	<p>The budget included detailed assumptions. The budget was complete, realistic, and included a viable start up five -year plan with operating budgets. The budget included reasonable, well supported revenue and grant/fundraising assumptions. The plan meets the financial needs in areas such fund raising and development.</p>	
<p><b>Performance Record (if applicable)</b></p>		

<input type="checkbox"/> Meets or Exceeds  <input type="checkbox"/> Partially Meets  <input type="checkbox"/> Does Not Meet		
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Section	Summary of Application Supplement	
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<b>Application Supplement</b>	<p>There is a need for higher performing K-5 schools in the North region but, at present, the region and the neighborhood (Raleigh) are over-saturated with elementary schools.</p> <ul style="list-style-type: none"> <li>• The proposed region (North) is currently under-enrolled by 677 seats at the K-5 Level</li> <li>• The proposed neighborhood (Raleigh) is currently under-enrolled by 203 seats at the K-5 Level</li> <li>• At present, only 26.8% of the K-5 seats in the proposed neighborhood (Raleigh) are at a level “3” or above on the School Performance Scorecard for K-5 Level</li> </ul>	
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Section	Summary of Financial Hardship & Impact	
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<b>Financial Hardship &amp; Impact</b>	<p>Expansion of charter schools imposes a cost on SCS – both directly and indirectly. It is also clear from <b>Section 4</b> of the <a href="#">Fiscal Impact Report</a> that the loss of operating funds caused by the transfer of BEP funds cannot be made up through a reduction in capital or facility costs or through the collection of an authorizer fee or lease agreements.</p> <p>Beacon College Prep fiscal impact on SCS includes:</p> <ul style="list-style-type: none"> <li>• The District will lose approximately 108 to 324 students over a 5-year period;</li> <li>• Based on projected per pupil cost of \$9,319, including transportation costs, for Year 1 and increase to \$10,087, including transportation costs by Year 5, respectively; the District will transfer BEP funds of \$1,006,430 to \$3,268,178;</li> <li>• Fixed costs, such as electricity, custodial, etc., will be required to be funded regardless of reduced enrollment;</li> <li>• Variable costs, such as instructional materials, supplies, etc., are associated with each student will increase or decrease directly proportionate to the number of students;</li> <li>• A large decline in enrollment may prompt reduction in teaching staff, but may not offset total loss of revenues. A reduction in operating costs will be necessary to reduce the loss of resources;</li> <li>• Maximum authorizer fee is \$35,000, which is not enough to recover the cost of additional services provided by the District; and</li> <li>• Additional seats will become available within the Raleigh neighborhood resulting in lower percentage utilization.</li> </ul>	
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