



LEAD Neely's Bend Charter Application

For use by Achievement School District Charter Schools
Applying to Tennessee Public Charter School Commission
Opening in the 2023-2024 School Year

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GENERAL INFORMATION

Name of ASD Charter School: LEAD Neely's Bend

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

Name of Primary Contact Person: Adrienne Useted, COO

School Address: 1251 Neely's Bend Road; Madison, TN 37115

Primary Contact's Telephone: 615-775-5254

Primary Contact's E-Mail Address: adrienne.useted@leadpublicschools.org

Secondary Contact's E-Mail Address: dwayne.tucker@leadpublicschools.org

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 _____ No X _____

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.

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 sponsor, I hereby certify that the information submitted in this application for a charter for LEAD Neely's Bend 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.

A handwritten signature in black ink that reads "Dwayne H. Tucker". The signature is written in a cursive style.

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.*

LEAD Neely's Bend serves grades 5 through 8 in a zoned middle school in the Hunters Lane region of Nashville with an emphasis on college preparatory, personalized learning for all students in our care. LEAD Neely's Bend's founding mission was to support, train, and educate the next generation of responsible citizens. From the beginning, we have emphasized English language arts and literacy as a means of developing life-long learners. Since we believe and research demonstrates that mastering those standards sets students up for success in an array of subjects, students at LEAD Neely's Bend spend extra instructional and small group time focused on reading and literacy development.



Over the past 10 years, the mission 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 Neely's Bend 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 beyond school.

LEAD Neely's Bend'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 Neely's Bend 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. 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 84% reporting on our most recent student survey that "ALL of my teachers have high expectations" and 75% of students agreeing that their school is challenging.

An effective educational environment cannot be limited to academics; thus, LEAD Neely's Bend emphasizes social and emotional development 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 Neely's Bend is a place where students are developing strong relationships with adults. 72% of LEAD Neely's Bend students agree that "I have an adult in the school I know I can trust" and 79% 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 Neely's Bend is part of a CREW – a smaller 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.

As a whole, LEAD Neely's Bend's educational program can be summarized by the vision for effective teaching honed and practiced by all staff: effective teaching at LEAD Neely's Bend facilitates data-driven, student-centered work balanced by both rigor and love and supported by a strong classroom culture and high expectations.

(b) Discuss the ways the school has progressed towards its mission and also address any challenges to achieving the established mission and how the operator plans to overcome these challenges.

Since its founding in 2015, LEAD Neely's Bend has made much progress in its mission to ensure students are equipped with the knowledge and skills to succeed in college and in life. Access to college and post-secondary success begins with academic readiness. Since 2017, we have posted some of the strongest, if not the strongest, proficiency and growth scores in our comparison group of ASD schools year-over-year. Despite the pandemic and all that it entailed for our students, we continued to perform at a TVAAS level 5. In the past four years, LEAD Neely's Bend has shown absolute achievement scores that far exceed those of the ASD average in Math and ELA. Students have performed well enough to exit the priority list, the first ASD school in Nashville to do so

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 therapists on staff, multiple counselors, and a robust culture team, led by an assistant principal of students who works with support staff to bring joy and discipline to the 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 Neely's Bend has an active Family Leadership Council who contribute to our school improvement plan creation, Title 1 spend, various school level events, and consistently meet with the principal to discuss the health of the school and students.

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 of the pre-pandemic years and, while growth is exemplary, we must accelerate our students' absolute success rate in order to ensure that all students are prepared for college and careers. To this end we have doubled down on our literacy instruction, hiring an instructional manager and 4 additional MTSS teachers to address student deficits. We are well aware that a majority of our students speak English as a second language and the students that do come to us with English as a second language arrive, on average, 2-3 years behind their grade level peers according to MAP. We have hired additional EL teachers post pandemic and committed to meeting our students where they are, resulting in improved ELPA scores over the past two years. We believe that the combination of additional literacy teachers, an improved EL program, and a school wide focus on literacy as the foundation for academic success will result in improved absolute success scores. Lastly, we have hired assistant principals of Math and ELA along with subject specific instructional coaches. We believe that this targeted approach to content areas coupled with our focus on literacy is the key to unlocking and accelerating our students' absolute success potential.

Another challenge we have experienced is ensuring all students are in school every day. Prior to the pandemic LEAD Neely's Bend consistently had a Chronic Absenteeism rate between 17-18%. During the pandemic and this past school year our Chronic Absenteeism rate has been above 30%. To address this concern, we have hired an additional staff member who is directly in charge of chronic absenteeism and manages our chronic absenteeism team; we have invested in a learning platform called DeansList that has improved our family communication and tracks our Chronic Absenteeism process down to the phone call; and we have worked with our families in order to impress on them the importance of school attendance as the determinate factor in their students' success.

Lastly, LEAD Neely's Bend must continue to refine its data driven instruction program, including interim assessments, reteach units, and data meetings related to student performance. While our current program has resulted in the doubling and tripling of proficiency rates since 2016-2017, we know we must continue this upward trajectory. LEAD Neely's Bend has a clear curriculum and excellent unit assessments associated with these curricula in ELA, Math, science and social studies. The continued refinement of our data driven instruction program will allow us not only to better gauge the efficacy of our curricula in preparing our students for mastery of TN Standards, but better predict our students' performance and inform mid-course adjustments to our lesson planning. This becomes even more important when we consider the switch to online testing that is coming in the 22-23 school year and the way that learning loss has impacted student success rates.

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.
 - a. 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.**

Currently, the school enrolls students primarily from its geographic priority zone as defined by the MNPS enrollment feeder pattern. The two primary elementary schools that are within this geographic priority zone are Neely's Bend Elementary School and Amqui Elementary, which account for more than 91% of our enrollment. We have a secondary enrollment zone that includes the following elementary schools: Smithson-Craighead Elementary, Bellshire Elementary, and Stratton Elementary; all of which we have established relationships with, and have consistently enrolled students from.

Should the school be authorized by the Charter Commission and become an open enrollment charter school, we would adjust our enrollment strategy by increasing our enrollment in the Madison Middle School zone, which includes the previously mentioned elementary schools of Bellshire and Stratton elementaries that are currently in our secondary enrollment zones. We would also expand our enrollment zones to include the broader Madison community, primarily drawing students who would be zoned to attend Goodlettsville Middle School or who may

attend other school options in the greater Madison area.

The tables below outline the 21-22 academic performance of the Hunters Lane cluster of middle schools. While both LEAD Neely's Bend and Madison saw promising TVAAS results, LEAD Neely's Bend has outperformed Madison Middle in both absolute achievement and student growth, while serving very similar student populations. While we do not anticipate significant enrollment from Goodlettsville Middle, LEAD Neely's Bend shows significantly more student growth, and greater achievement in Science and Social Studies, but falls a few percentage points behind Goodlettsville in absolute achievement in ELA and Math.

21-22 TNReady Absolute Achievement: Hunters Lane Cluster Middle Schools (6th-8th grade)

% of All Students who Met or Exceeded	LEAD Neely's Bend	Madison Middle	Goodlettsville Middle
ELA	10.2	5	13.6
Math	8.5	6.1	10.8
Science	12.5	5.9	8.6
Social Studies	17.4	9.8	6.3

21-22 TNReady Absolute Achievement: Hunters Lane Cluster Middle Schools (5th grade)

% of All Students who Met or Exceeded	LEAD Neely's Bend	Madison Middle	Goodlettsville Middle
ELA	7.2	10.1	8.4
Math	11.5	Not reportable	9.2
Science	12.4	Not reportable	7.6

21-22 TNReady TVAAS: Hunters Lane Cluster Middle Schools

School Name	LEAD Neely's Bend	Madison Middle	Goodlettsville Middle
Overall Composite	5	4	1
Literacy Composite	3	5	5

Numeracy Composite	5	5	5
Literacy and Numeracy Composite	5	5	5
Science Composite	5	1	1
Social Studies Composite	3	3	1

Listed below are the enrollment trends over the past five years for schools within our primary and secondary enrollment zones. Due to the rezoning of 5th grade into elementary in 2022, all elementary schools have seen an enrollment increase and the middle schools have seen a proportional decrease. However, when the 5th grade shift is excluded, our two Primary Feeders are experiencing a 5-13% increase in enrollment since the low of the pandemic. Madison Middle, and its feeder schools, Stratton and Bellshire, continue to see slight enrollment declines after factoring in the 5th grade transition. Overall, K-12 enrollment in the cluster has stabilized since the 2019 school year. This supports our enrollment strategy of continuing to deepen our relationships with our existing two Primary feeder elementary schools, who are experiencing the greater enrollment growth, while expanding our open enrollment feeder pattern to include the Madison cluster as well. We also anticipate that by increasing our recruitment efforts beyond our existing two elementaries we may be able to attract some families who may currently choose other charter options.

School	Feeder	2016	2017	2018	2019	2020	2021	October 2022
Amqui Elementary	Primary Feeder	535	498	461	457	424	426	508
Neely's Bend Elementary	Primary Feeder	387	320	268	301	267	275	369
Bellshire Elementary	Secondary Feeder	489	356	357	341	297	352	338
Stratton Elementary	Secondary Feeder	567	512	506	496	439	418	406
Liberty Collegiate Middle	N/A- Middle School	448	451	442	419	450	350	307
Madison Middle School	N/A- Middle School	532	562	545	559	566	538	395
Hunters Lane High School	N/A- High School	1518	1416	1327	1295	1335	1407	1459
K-12 Enrollment	Total	4841	4466	4299	4268	4175	4132	4121

(b) Describe the specific demographic population of students the school currently serves under the ASD and any changes in the population of students that the school will serve under the Charter Commission.

LEAD Neely's Bend serves a diverse student population. Per our most recently released state reported data in 2021, 43.5% are African American, 42.9% are Hispanic and 13.2% are white. 50.9% of students are economically disadvantaged, 34.4% are limited English proficient and 14.6% are SWD. The student population of the broader Madison community is almost identical to that of LEAD Neely's Bend with very similar student and family demographics, although the broader community has a slightly higher proportion of Black students and fewer Hispanic students (see tables below for specific details). The current student demographics of the Madison zone closely mirror the demographics from Neely's Bend several years ago. We anticipate the majority of any growth in student enrollment to come from the Madison Middle School geographic area and as a result, we anticipate minimal changes to the student demographics we serve and any shifts will be similar to those we have experienced before.

21-22 Student Demographics: Hunters Lane Cluster Middle Schools

SCHOOL NAME	LEAD Neely's Bend	Madison Middle	Goodlettsville Middle
AFRICAN AMERICAN	43.5	57.6	45.8
ASIAN	Less than 5%	*	Less than 5%
WHITE	13.2	10.9	19.1
HAWAIIAN PACIFIC ISLD	*	*	*
HISPANIC	42.9	31.5	32.4
NATIVE AMERICAN	*	*	Less than 5%
TOTAL	485	569	602

21-22 Student Demographics: Hunters Lane Cluster Middle Schools

SCHOOL NAME	LEAD Neely's Bend	Madison Middle	Goodlettsville Middle
MALE	54	53.6	50.2
FEMALE	46	46.4	49.8
ECONOMICALLY DISADVANTAGED	50.9	58.9	46.3

LIMITED ENGLISH PROFICIENT	34.4	27.4	24.6
STUDENTS WITH DISABILITIES	14.6	14.2	15.1

(c) Describe any enrollment practices, processes, and policies that the charter school will use while authorized under the Charter Commission. Specially address how the school will maintain enrollment projections when moving to a non-zoned, open-enrollment environment.

If authorized by the Charter Commission, LEAD Public Schools will operate its own lottery process which will include a re-enrollment period for our currently enrolled LEAD Neely’s Bend students. The re-enrollment 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 adequately estimate the number of students needed to be successfully recruited and accepted via our lottery process and application launch. The re-enrollment 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 has maintained a recruitment calendar that has generated leads that will continue cultivating interest from families in the Madison community. These community canvassing efforts will span our current enrollment zones, and expand into the Madison Middle enrollment zone so that we can broaden our catchment area. 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 Neely’s Bend as an open enrollment charter school. Additionally, we will work with our partners in the community to serve families at community centers to spread the word about our school, and continue serving the neighborhoods as we build the brand in the Madison 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 come in, meet our faculty and staff, receive a tour of the campus, and be able to utilize our computers to apply to LEAD Neely’s Bend. After the 30 day lottery period, we will then execute the lottery and accept families in the order in which they applied to LEAD Neely’s Bend. 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. Underlying these efforts will be our feeder engagement where we will host informational sessions both at LEAD Neely’s Bend and also at the feeder elementary schools where we will provide information about LEAD Neely’s Bend consistent with how we have done since our schools inception. Community canvassing, door-knocking, flyering, business canvassing and engagement, partnering with community organizations, and executing referral campaigns with our current enrollment are the activities that will be included in our recruitment strategy as an open enrollment school.

Expanding our zone will not result in increased enrollment immediately. The enrollment summary below evidences an enrollment of 425 in the first year under TN Charter Board authorization and then ramps up by 75 additional students to 500. 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 Madison geographic zone.

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

(d) Complete the enrollment summary and anticipated demographics charts below (removing any extra grade levels as necessary).

See below. Note that 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.

Number of Students

Grade Level	Year 1 2023	Year 2 2024	Fully Enrolled Year 2024 and beyond
5	50	100	100
6	125	150	150
7	125	125	125
8	125	125	125
Totals	425	500	500

Current Demographics	% of Economically Disadvantaged Students	% of Students with Disabilities	% of English Learners
	51%	15%	34%

Anticipated Demographics in Year 1 under Charter Commission	% of Economically Disadvantaged Students	% of Students with Disabilities	% of English Learners
	55%	15%	32%

1.3 Academic Focus and Plan

In this section:

(a) Describe any key academic plan features for the charter school that will differ from the operator’s original application, the rationale for implementing these different features and any new resources they would require.

(b) Describe what went well that the school intends to continue if authorized by the Charter Commission. NOTE: Reviewers will review the original application for context and may ask questions during the capacity interview regarding the academic program.

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 tenant of our approach to instruction, as does high-quality state standards aligned curriculum, data-driven instruction and our overall assessment philosophy. From the beginning, LEAD Neely's Bend put forth significant resources and efforts into supporting diverse learners, including students with IEPs and English Language Learners. Supporting teachers with robust, individualized, instructional coaching also remains an important contributor to our success. These core areas of our school will continue through new authorization with the Commission.

However, our original charter application to the Achievement School District was finalized in 2011, prior to the selection of LEAD Neely's Bend as a partner school. While we maintain many components of our original model, we have adopted new practices over the past 11 years in an effort to tailor our model to the specific needs of the students at LEAD Neely's Bend 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 Neely's Bend 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 BEP 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 1 instructional leader for every 6-8 teachers. This allows our coaches to prioritize the development of Saturday 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. 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 Neely's Bend 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 common core 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.
- FOSS - The Full Option Science System (FOSS) 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. 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 reading intervention for students with IEPs as well as for Tiers II and III of Response to Instruction and 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. *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.
- The Network Academic team is researching common mathematics intervention curriculum to pilot in 2022-2023 and fully implement in 2023-2024.

5. **Enhancements to our Academic Model:** At the Network level, additional support has been added to enhance student learning across the continuum.

- MTSS Model: Our Multi-tiered systems of support (MTSS) model has benefitted from the hiring of a director of MTSS leading the work around expanded intervention in reading and mathematics as well as a director of student supports leading the work around behavioral supports. At the school level, instructional managers and assistant principals of instruction 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 5 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 works closely with instructional managers to provide professional learning focused on differentiated instruction, behavior support, and compliance. In collaboration with network core content area directors, training focused on serving diverse learners across all content areas is routinely delivered.

- 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.

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?*

LEAD Neely's Bend ended the 2021-2022 school year with a success rate of 10.3% and a TVAAS composite Level 5 for the third year in a row, meriting an exit from priority school status. In order to exit from the priority list, our team has been laser-focused on our student academic success. As we believe that teachers are our greatest asset and that literacy is the key to success in all subjects, we have expanded our teaching staff across the board, and specifically have increased our ELA staff by nearly 50% from 2021-2022. Student literacy has benefited by a strong emphasis on independent reading and on writing across the curriculum. We are highly focused on developing our students as readers and have seen our literacy scores increase year-over-year prior to the pandemic and believe that this additional investment in literacy MTSS teachers will result in improved levels of ELA performance. Teachers were supported in developing students' intellectual processing of math concepts and we hired a dedicated API with a focus on mathematics. Along with other middle schools in the LEAD network, LEAD Neely's Bend implemented new ELA and math curricula.

In addition, 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. This leads to a high level of teacher satisfaction and belief in our school with LEAD Neely's Bend scoring in the top quartile

nationally on the Insight Instructional Culture Index. Teachers and instructional coaches were supported in both content areas through the LPS Academic Team. In addition, external support for ELA implementation was provided through a partnership with TNTP and external support for mathematics implementation was provided through a partnership with Achievement First.

Finally, Student Support Team members 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.

We have a clear plan in place to continue this upward trajectory of performance results and to meet our school goals in the future.

First, data from the 2020-2021 school year highlighted the need for intensive reading intervention for a significant number of our students. LEAD Neely's Bend expanded RTII programming to include more students in tiered reading intervention and adopted new scheduling to dedicate additional time to reading intervention using common curricula within each tier. LEAD Neely's Bend hired a full time RTII Instructional Manager and Reading Interventionists to support this endeavor and at the network level, a director of MTSS was hired to support this effort. The efficacy of this initiative is being monitored using a variety of nationally normed assessments as well as internally developed walkthrough tools.

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. This year, we are continuing to provide robust support in math and ELA, while moving towards the adoption of common curricula across the Network in science and social studies. Positions at the Network level have been added to support science and social studies content teachers and to facilitate the selection of curriculum. We are expanding data driven instruction services that function within our curriculum to align assessment strategies culminating in predictive interim assessments.

We have added additional 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 Instructional Manager to provide coaching and development. The Academic Team has developed and is implementing a coaching cohort focusing on both best practices in the art of instructional coaching as well as content specific coaching practices.

We continue to focus on EL and ExEd populations that reflect our changing student demographic. As we adapt to meet the needs of our students as well as the challenges of expanding our staff serving our diverse learners, the NeST has added two positions to assist schools in focusing on ExEd and EL compliance issues, allowing greater opportunities for teachers to focus more intentionally on strong student instruction.

Finally, the need for consistent systems of student support was another key area highlighted by the pandemic. Under the guidance of the director of student supports, school support and culture systems are currently being revised and codified, with expectations consistent across all schools.

All these strategies tie together to form a laser like focus on student outcomes, with the end goal of meeting or exceeding district averages over time.

(b) 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](#).

LEAD Neely's Bend 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.

The leadership team at LEAD Neely's Bend has developed goals for the 2022-2023 school year to increase the school's overall success rate to over 25%, maintain a level 5 TVAAS, reduce the school's suspension rate to under 13%, and reduce chronic absenteeism to less than 15%. Specifically with regards to the Charter Commission Performance Framework our long term goals are as follows:

Student achievement and comparative performance:

- Absolute Achievement: LEAD Neely's Bend will meet its target AMO in each school year until such time that it has met or exceeded district success rate averages and / or scores in the top 50% of schools statewide. We will do this through an expanded focus on MTSS, a strengthened coaching structure dedicated to teacher improvement, and a robust Data Driven Instruction model that both informs and improves our instruction.
- Growth: LEAD Neely's Bend will continue to be a level 5 school for overall composite growth. We will do this through our continued focus on meeting each child where they are and working with them to improve not only their grade level performance but their standards level mastery. We will use MAP as the main DDI tool to determine whether or not we are on track for meeting our growth goal.
- Chronic Absenteeism: LEAD Neely's Bend will meet its double AMO target in year 1 and its AMO target in each successive year until Chronic Absenteeism is under 15%. We believe that our ADA is the key to lowering Chronic Absenteeism and to that end have hired a responsible party to lower Chronic Absenteeism at LEAD Neely's Bend who leads both the daily attendance team and the Chronic Absenteeism team.
- ELPA: 60% of LEAD Neely's Bend students will meet the growth goal. We will do this through a robust EL model that is supported by a school level coach and a network team.

School Culture:

- Suspension rate: LEAD Neely's Bend will suspend less than 13% of its students. 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.
- Student attrition rate: Our goal is to retain 85% of students whose primary address remains in our geographic zone and to retain at least 75% 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.

(c) Describe the process for setting, monitoring, and revising academic achievement goals.

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.

(d) Describe how the school will implement a corrective action plan if the school falls below state, district and/or its own academic achievement goals.

If LEAD Neely's Bend 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:

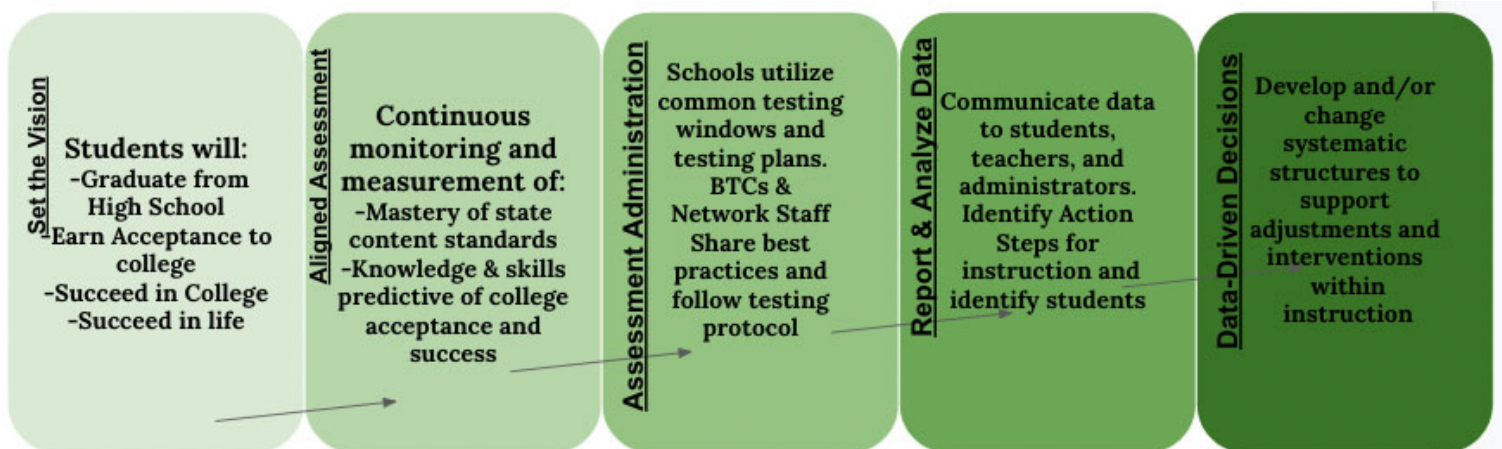
- (a) Identify the primary internal assessments the school uses to assess individual student and sub- group learning needs and progress throughout the year. Explain how these internal assessments align with the school’s curriculum, performance goals, and state standards.
- (b) Explain how the school 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 Neely's Bend 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 Neely's Bend, as well as how data from assessments are utilized to inform school level decisions.

TNReady: TNReady is 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 20-21 school year in an attempt to find curriculum for both subjects with rigorous materials in addition to culturally relevant text.

Measure of Academic Progress (MAP) reading and math tests: LEAD Neely's Bend 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 to 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, & 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 2-3 times per year as an opportunity to see how students demonstrate knowledge and skills on high-leverage standards in ELA and math. NIAs are written by the network 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 Neely's Bend, 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 Neely's Bend 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 in the virtual environment. 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 Neely's Bend 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 the five rounds before each Individual Learning Plan Update. ILPs are updated every 4.5 weeks 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 Neely's Bend 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. For example, 2017-2018 scores suggested that students in the EL English course did not receive grade-level appropriate, rigorous content. As a result, LEAD Neely's Bend focused on creating curriculum for EL courses that mirrored the rigor of English classes and provided the necessary supports to make the content accessible to EL students. Finally, LEAD Neely's Bend adopted the philosophy that teaching with EL strategies benefits all students; thus, whole-staff professional development focused on EL 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 Spanish. This year we are also offering the test to our first Tagalog speaker! 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 21-22 school year we promoted 17 eighth graders that earned two world language credits, including Spanish and Arabic. 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 2022, LEAD Neely's Bend award its first students the Seal of Biliteracy Pathway Award with four 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 2 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 Neely's Bend 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 Neely's Bend 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.

1.7 School Calendar and Schedule

In this section:

- (a) Provide the annual academic calendar for the school and the school's daily schedule by grade as Attachment A.*

See attached.

- (b) 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.*

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 engage in CREW and get in the mindset for learning. Electives such as art, PE, health, music and 21st Century Skills 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 from 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. LPS 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 Neely's Bend 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 10th 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 for 30 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 Neely's Bend 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.

Math Intervention

LEAD Neelys Bend 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. The programs utilized for math intervention are iReady, IXL and Zearn. Teachers select specific math standards to address with students weekly to close gaps using iReady and Zearn. 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.

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

At LEAD Neely's Bend 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 & Numeracy, are provided with target intervention and enrichment, and participate in a variety of elective classes.

Summer school is typically run by an assistant principal of instruction with support of 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?

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

The director of exceptional education (ExEd) works as a part of the Network Support Team (NeST), specifically supporting Exceptional Education programs at each LPS campus. The director is 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 to ensure compliance with all laws and regulations related to exceptional education students. The director of exceptional education manages an exceptional education compliance coordinator, who is responsible for supporting staff network wide with case management and compliance.

The director of EL works as a part of the Network Support Team (NeST), specifically supporting English Learners at

each LPS 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 Neely's Bend 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 TN Charter School Commission.

(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.*

Provision of excellent service to diverse learners is a key component of LEAD Neely's Bend's academic program. In 21-22, 11.1% of LEAD Neely's Bend (58) students had Individual Education Plans (IEPs). This number has remained fairly consistent over the last three years. Additionally, LEAD Neely's Bend had 50.1% of students in the EL program (active-monitored year 4). LEAD Neely's Bend celebrates the diversity of its student body, inclusive of students with different learning abilities and various language and cultural backgrounds. LEAD Neely's Bend 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 and more formally through IEP and ILP communication.

Students with Disabilities

The exceptional education (ExEd) instructional manager, in conjunction with the principal, assistant principal of instruction, and network director 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 Neely's Bend 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 feel informed and confident 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 Neely's Bend 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, members of the LEAD Neely's Bend'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 monthly in Network-wide professional learning through our Coaching Cohort program.

To support failing students with disabilities, ExEd teachers and the ExEd coordinator 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 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 and the exceptional education coordinator. 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 Neely's Bend 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 (RTI²) 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 (RTI²) 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.

- (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.*

EL Students and State Board Rule 0520-01-29

LEAD Neely's Bend 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 ESL Services. LEAD Neely's Bend 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 LEP student ratio.

At LEAD Neely's Bend we utilize the ELlevation platform to house our Individual Learning Plans (ILPs). ILPs are created for students within the first 30 days of school, and updated every 4.5 weeks 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. Teachers all have access to ELlevation to view these accommodations, and we also have 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, but ELlevation is the platform that houses our ability to monitor and evaluate the progress and success of EL programs. ELlevation has internal tools that provide data visualizations in order to group and identify students for instructional programming. ELlevation also has monitoring forms that LEAD Neely's Bend 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.

English Language Learners

The mission of the LPS 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 Neely's Bend'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 Neely's Bend differ by student ACCESS score. Here is an overview of the specific models utilized at LEAD Neely's Bend by ACCESS score, followed by in-depth rationale for this choice:

- 1.0-20: Pulled out into a sheltered ELD class during their English block. Roughly 120 minutes daily.
- 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.
- 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.
- Transitional: Transitional students are monitored at each grade report. Transitional students with low performance in their content areas have monitoring forms filled out by their teachers, identifying root causes of low academic performance, and suggestions with additional supports to ensure success..
- 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 Neely's Bend.

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 EL coordinator 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 EL coordinators 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 our Coaching Cohort program.

Each year, the dir 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. LPS 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), EE 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 EE & 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 B the school's Student Handbook and indicate any changes that will be made if authorized by the Charter Commission.

We do not anticipate making any substantial changes to the Student Handbook if authorized by the Charter Commission; however, 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.

(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.

At LEAD Neely's Bend, 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 Neely's Bend 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.

The Culture Goals for the 2022-2023 school year are:

- Below 10% Out of School Suspension Rate
- 95% Attendance Rate
- 17% Chronic Absenteeism Rate
- 80% of families successfully engaged (1 touchpoint a year) and 60% meaningfully engaged (3+ touch points a year)

In order to achieve our culture goals and to promote a positive academic environment, LEAD Neely's Bend employs the following programs and strategies:

PBIS

LEAD Neely's Bend 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

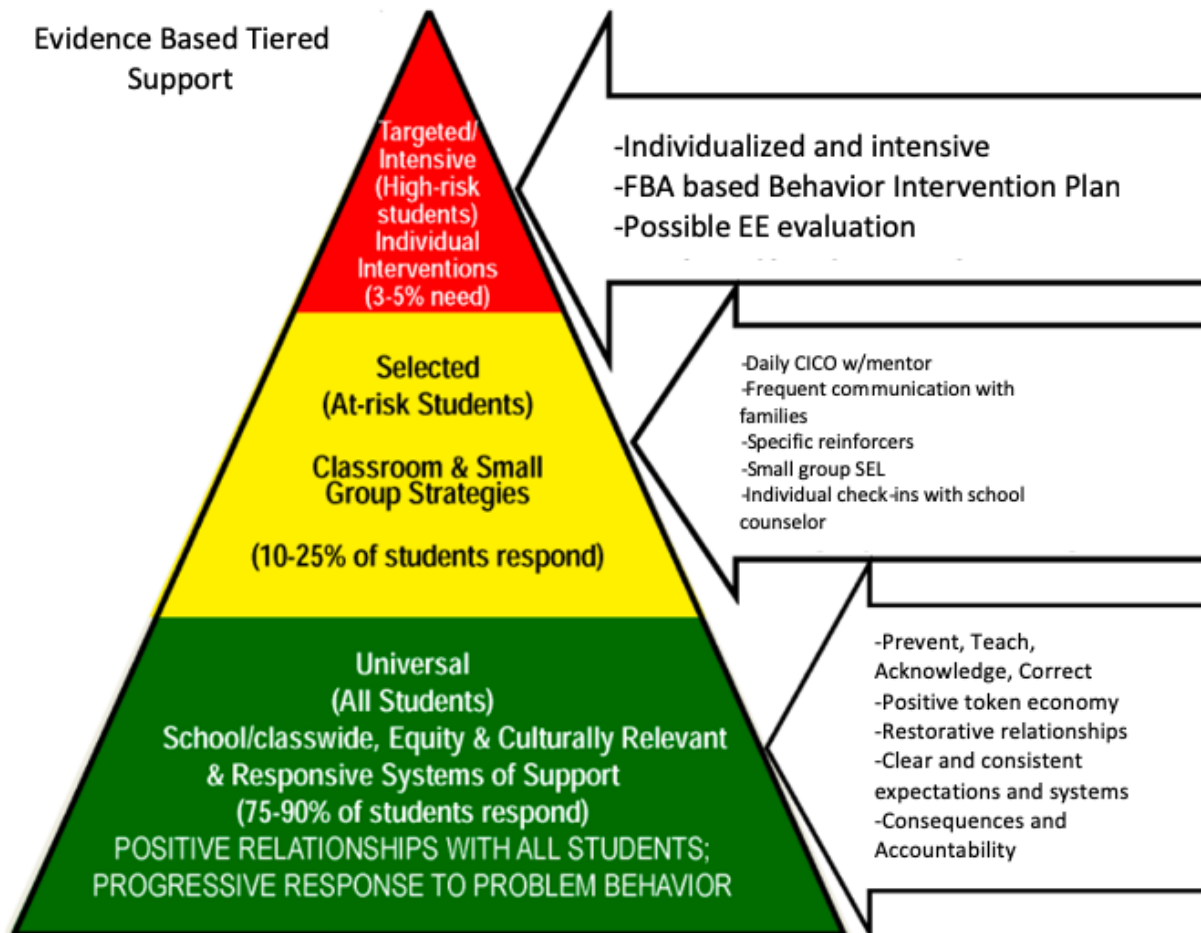
At LEAD Neely's Bend, we seek to UNDERSTAND our students and view them through multiple lenses. We do this through inclusiveness to all and embracing each student and their families. We believe that building strong and healthy relationships with our students and their families is key to a healthy school 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. For LEAD Neely's Bend to be a successful school and to have a strong student culture, we must meaningfully engage the families of our students.

Trauma Informed Care

At LEAD Neely's Bend 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," (pbis.org, PBIS in the Classroom). 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 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 Dean's List 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 3 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. Tier II students. 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 EE 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.

(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.

LEAD Neely's Bend faced a number of challenges in changing over from MNPS to ASD, primarily, student and family buy-in and building a culture of learning. In order to overcome these challenges and create a space where all students and families felt comfortable, safe, and welcome we made a number of changes to our student culture. 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 Neely's Bend 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 then celebrate students and actions 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, Illuminate, 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.

(d) How does the school intend to integrate new students into the school culture once it becomes an open-enrollment charter school?

LEAD Neely's Bend 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.

(e) Provide the student discipline policy as Attachment C (if not already included in Attachment B of the school handbook) and indicate any changes that will be made if authorized by the Charter Commission.

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 D](#) 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.*

LEAD Neely’s Bend 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 TN 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. Additionally, beginning in December, we will host our re-enrollment process, during which we speak to families about their intentions for the 23-24 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.

- (c) *Describe your plan to recruit and retain students, if authorized by the Charter Commission, with particular attention to the shift from zoned enrollment to open enrollment.*

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 Neely’s Bend. We will leverage this process to continue to successfully engage our LEAD Neely’s Bend 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% -85% of families that were eligible to return to LEAD Neely’s Bend. 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.

21-22 Student Attrition

Reason	# of students
Moved out of district or state	45
Transportation	0
Concerned with academic expectations	0
Concerned with discipline practices	0
Expelled	1
Withdrawn due to breach of behavior agreement (but not expelled)	0
Unknown	0
Other (please specify)	20-Transfer within district

	5-Drop out investigation 3- Non-Public School Transfer 2-Online School
Total # of Students Withdrawn	76
Student Attrition Rate (%)	31%

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 Public Schools' schools. 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-into a school of choice. With this experience, we will leverage learned best practices as we enter this new phase of LEAD Neely's Bend with the Charter Commission.

As a neighborhood zoned school, we have exclusively recruited from the LEAD Neely's Bend 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 Neely's Bend.

LEAD Neely's Bend will continue to employ a dedicated full time FACE (family and community engagement) member, as well as rely on our network FACE support team. We also anticipate adding an additional network wide staff member to support with added student recruitment responsibilities. 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 Neely's Bend. We feel confident that the school, its mission, and expectations will not only be accepted by the community but also actively supported. Formal outreach efforts will commence upon formal acceptance of this charter proposal by the Metro Nashville Board of Education.

LEAD will be 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.

(d) Does the school anticipate any student attrition if authorized by the Charter Commission, and how will the school backfill those students?

LEAD Public Schools anticipates attrition consistent with its historical numbers. As previously stated, those numbers typically range from 77%-85% in looking at our 5 year historicals. An adjustment that we are making in potentially joining the Charter Commission is moving up our re-enrollment process so that we can have an understanding of how many of our currently enrolled families intend on re-enrolling for the 23-24 academic year. This re-enrollment 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 will host a referral campaign with our currently enrolled students, continue our partnership with Smithson-Craighead elementary, and additionally recruit in our secondary enrollment zones via our community engagement strategy. We have also identified a tertiary zone that if need be, 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) What feedback regarding the application to the Charter Commission has been provided by parents and/or the community, and how has this feedback been incorporated into this application?

In preparation for this application, the LEAD Neely's Bend principal, family and community engagement coordinator, and network support staff convened an informational session for families and community partners to begin the process of communicating the transition to a new authorizers and to receive questions and feedback on the process. Families and community members are proud of the school exiting the Priority List and understand that this is the next step in that process. Concerns raised with the LEAD team included whether the transition would impact the funding of the school or the extracurricular activities that families enjoy. Community partners wanted to be sure that this transition wouldn't jeopardize their ability to continue to work with the school or provide after school services to students and families. Families also wanted to make sure that if enrollment increased due to a broader geographic region that the school would have the teachers and resources necessary to support additional students without jeopardizing existing programming. The school leadership team was able to reassure our stakeholders that the funding and services would not change due to a new authorizer. A broader conversation then turned to the transition from a zoned enrollment to an open enrollment school. Families were supportive of expanding our school zone and had a number of suggestions on how to ensure this transition went smoothly for both current and future families.

Feedback from families and community partners was incorporated into this application and into our plans moving forward. Most notably, current families want us to continue to offer 5th grade, despite the fact that MNPS has moved 5th grade into elementary grades in neighboring schools. Parents also had specific suggestions on how to successfully recruit students in the broader Madison 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. Parents also had suggestions for how to ensure that all families are made aware of the transition to the Charter Commission, which included a parent meeting in January and handing out flyers in the car rider line and at athletic events. Finally, they wanted to ensure that re-enrollment of existing students was as easy as possible, with minimal paperwork. One last technical hurdle from partners was a reminder that with broader geography that we will need to provide more transportation not just immediately after school, but potentially for afterschool programs. These changes have been incorporated into our recruiting plans and operational plans this year.

(b) How was feedback collected from parents and/or the community about the application process and potential transition? How many opportunities were provided for the community to submit feedback?

On October 22, 2022, we hosted a community celebration, during which we celebrated our exiting the priority list with our LEAD Neely's Bend faculty, staff, and families with food, music, and games. During this event, we celebrated this momentous occasion with attendees. On November 10, 2022, the LEAD Neely's Bend leadership team collaboratively with our network leadership team hosted a parent and community meeting with families and community partners to talk about our exiting the priority list, and further detail what our joining the Charter Commission means for LEAD Neely's Bend. As with all our parent communication, feedback was conducted in both English and Spanish with a translator present. While the majority of participation was in person, we also had families join us via Zoom to ensure that all families who wanted to participate could do so. See section (d) below for how we plan to continue this work during the authorization process.

(c) Describe any changes to the parent and community engagement strategy if authorized by the Charter Commission.

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 Madison community, not just the LEAD Neely's Bend zone, so the shift to a broader geographic zone will also have minimal impact on our community engagement strategy.

(d) Described 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.

LEAD Neely's Bend is excited to share that during the 2020-2021 school year we successfully engaged 89% (roughly 404 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 through 12 earmarked engaging activities including the following activities: parent teacher conferences, survey completions, attending on and off campus events, volunteering on campus, and providing resources to support our LEAD Neely's Bend community. These initiatives ensure that the campus is intentionally building authentic relationships with our families that encourage engagement with our school community.

Though led by our family and community engagement coordinator, what has made these initiatives sustainable is family and community engagement being a core component of our school culture and our setting expectations for our school staff to all be involved. We have an active Family LEADership Team, and also current community partnerships with the Madison Community Center, Madison Police Department, Amqui and LEAD Neely's Bend

Elementaries, Caron Treatment Centers, Team Smile, Nashville After Zone Alliance (NAZA), the Nations Ministry, and the Nashville International Center for Empowerment that provide engaging activities 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 Neely's Bend. Not only did we average around 40 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. Another initiative that met the needs of our families well during the pandemic was our LEAD Serve Others Stations which provides household essentials, internet assistance via hotspots, and cleaning supplies. To complement our Serve Others Stations, LEAD Neely's Bend maintained a campus pantry where families were able to consistently receive food on demand. These services were not only a tremendous value add, but also served as a differentiating factor when families considered withdrawing due to changing family circumstances as a result of the pandemic.

One of our more successful engagement initiatives is our Student-Led Conferences (SLCs) which LEAD Neely's Bend 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 Talking Points, a communication platform that allows teachers and families to communicate in a family's home language. At LEAD Neely's Bend, 85% of our parents speak a language other than English at home and thus the implementation of this system has been transformational in being responsive to the needs of our families.

Moving forward, the Executive Leadership Team along with the campus leadership team has created a communications plan aligned to the TN Charter Commission 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 Neely's Bend families.

(e) Provide, as Attachment E, 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.

See attached.

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.*

The current LEAD board is composed of 13 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:

- 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.
- Governance Committee: The LEAD Governance 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.
- Executive Committee: This committee is composed of the Board Chair, Chairs of all other committees and the CEO and, 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

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.

- (b) *Describe what staff reports to the governing board and how those individual(s) are evaluated.*

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.

(c) Describe plans to recruit additional board members with identified skills and how the governing board has handled board member attrition.

LEAD Board policy allows for up to 20 board members, compared to our current 13. 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. We also are in the process of adding a second parent to the LEAD board. Even once the final size of the board is achieved, the board will continue to recruit new members to ensure effective succession planning. The Governance Committee is responsible for attracting, evaluating and nominating potential board members and ensuring adequate parent representation amongst the board. Board members have clear expectations and orientation for their roles and participate in various committees to further support the school.

(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.

The Board completes annual training as required by law and via Tennessee code as prescribed in this section. Training is coordinated by the TN Charter School Center and has been completed by all board members in 2022.

(e) Describe the circumstances under which complaints are brought to the board and the process for addressing them.

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 Committee. If either party is still dissatisfied with the outcome of Step 3, the issue will be placed on the agenda of the next regularly scheduled meeting of the Board's Governance Committee. The meeting will be held in executive session due to privacy requirements.

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
Jimmy Patton	CFO, Rogers Group	Finance; Operations	Finance Committee 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. Brian 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

Please include the following governance documents as Attachment F:

- F1. Articles of Incorporation*
- F2. Proof of non-profit and tax-exempt status*
- F3. By-laws*
- F4. Code of Conduct*
- F5. Conflict of Interest Policy*
- F6. Board policies (including frequency of meetings, open meetings and open records)*

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).*

LEAD Public Schools currently has a lease with MNPS for the LEAD Neely’s Bend Facility. We intend to continue to lease the building for a minimum of three more years. Upon approval of the charter commission contract, we will engage MNPS in their willingness to sign a longer term lease agreement or to purchase the facility. However, we have actively prepared for the possibility of needing a new long term facilities solution.

- (b) If planning to rent or purchase the current facility, describe the operator’s plans for capital repairs and improvements on the facility.*

LEAD Public Schools is already responsible for improvements on the facility. Recent examples of this include HVAC replacements, security enhancements and site grading work to improve the exterior student space. All schools in the LEAD network, including LEAD Neely’s Bend, 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 TN Charter School Facilities grant. LEAD Public Schools has leadership experience in both facility acquisition and facilities management, and currently leases several buildings from MNPS.

- (c) Describe the school’s facility contingency plans should the school need to vacate its current facility.*

Should the school need to vacate its current facility upon expiration of the lease, the LEAD Board is

committed to leasing or purchasing an alternate school location. 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. Given our existing partnership with MNPS, our preferred strategy would be to partner with MNPS on a facilities solution that meets the needs of the students, but we are prepared to develop a private facility as well.

LEAD has already worked with a third party facilities acquisition company to create 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 an established relationship with multiple architecture firms and contractors we would seek to engage in a bid for services should they be needed. Furthermore, LEAD Public Schools has a strong balance sheet, positive cash reserve and established relationships with potential lenders to assist with securing any necessary financing. See the Budget Narrative in the appendix for financial assumptions related to future lease rates and contingency costs.

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 independently 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 turned two out of the three office buildings into a school. The initial renovation created space for grades 5 and 6 and converted one of the office buildings into a fully functioning kitchen with a cafeteria large enough to support a full 5-12 school. The second and third phase of renovation work fit 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. In the event we needed to identify and develop our own space for LEAD Neely's Bend we have the 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 G. 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.*

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 CEO and executive team. The Board hires, evaluates and holds accountable the LEAD CEO. 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 HR officer, VP of development, director of enrollment and family engagement, and director of communications. LEAD Neely's Bend is headed by a school principal, who is supported and evaluated by the head of middle 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 Neely's Bend staff ultimately report up to members of the SLT. In addition, LEAD Neely's Bend has a Parent Leadership Council who provides advisory input to the School Leadership Team on a regular basis.

(b) Describe the teacher evaluation model that the school utilizes that is in alignment with State Board Policy 5.201.

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". (TN Department of Education TEAM webpage)." 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.

(c) Describe the plan to ensure a fully licensed teaching staff if authorized by the Charter Commission.

Compliance with Teacher Licensure is the responsibility of the CHRO and the talent recruitment manager. LEAD seeks to recruit and retain teachers who have already secured their TN 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. As EL certification is one of the most difficult certifications to find the necessary staffing for, LEAD has cultivated a partnership with Lipscomb to pay for EL Endorsement for those who are seeking to teach EL and commit to continue working at LEAD.

(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.

Teacher retention at LEAD Neely's Bend has remained fairly stable between 65% and 71% per year, as shown in the table below. In the transition to the TN Charter Commission, our goal is to "meet expectations" on the performance framework by increasing our teacher retention rate to 75-85%. LEAD administers the TNTP Insight Survey twice per year 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 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 that 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 manager 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.

Neely's Bend 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. They have overcome these challenges through partnerships with organizations such as Relay and Nashville Teacher Residency. LEAD currently has a \$200K grant through Score focused on creating a new teacher residency program specifically for potential math teachers.

Teacher Retention	18-19	19-20	20-21	21-22
LEAD Neely's Bend	68%	68%	71%	65%

(e) Discuss your teacher recruitment strategy to attract and retain high quality, fully licensed teachers and staff.

Our recruitment strategy starts first and foremost with retaining our existing staff. We have revised our Employee Value Proposition to be more competitive in effectively attracting, developing and retaining great teachers. LEAD's Employee Value Proposition is based on five pillars:

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 we 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 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 1 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 retention and development, LEAD uses its ability to innovate in human resources as a competitive advantage over traditional public school systems and other charter public schools. Partnerships with Teach for America, Blueprint, 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 within LEAD Public Schools.

LEAD Public Schools recruits, selects, and hires the highest caliber teachers and support staff. Our Talent and Recruitment 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. To support with additional teacher recruitment, we intend to add an additional Talent Recruiter to the network team at the end of the 21-22 School Year.

The annual hiring process begins at the end of November and continues through July of each year. A recruitment strategy is developed based on data reports 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, 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.

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 and 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 capacity in our staff and their investment in the next hires.

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

(f) Describe the process and results for collecting teacher and staff feedback on the proposed transition process if authorized by the Charter Commission.

Teachers and staff met during an all Staff meeting on November 8th to discuss the transition process to the TN Charter Commission. The bulk of the discussion focused on the transition to serving a larger geographic region and the transition to an open enrollment school but teachers also had questions about whether the change would significantly impact the school's funding. We intend to continue to communicate to our staff the progress of the application and any concrete changes (for example, the transition to a new SIS, potential transition to a new food vendor, etc) as those are determined. Staff members will be encouraged to participate in the public meetings hosted by the TN Charter Commission.

(g) Describe any leadership changes that have occurred while authorized by the ASD and the steps taken to ensure a smooth transition between school leaders.

LEAD's first two years of Neely's Bend oversight saw significant school leadership and staff turnover, and as a result, slower academic growth. Unsatisfied with the school's progress, in 2017 Jay Brown was appointed head of schools for all ASD chartered schools. Prior to her appointment, Ms. Brown served as chief academic officer for LEAD Public Schools. In conjunction with appointing a new head of schools for ASD schools, Tait Danhausen was appointed principal for Neely's Bend. Prior to assuming the role as NB principal, Dr. Danhausen served as principal for Cameron Middle School, a LEAD zoned enrollment turnaround school chartered by Metro Nashville Public Schools. Under his leadership, Cameron transformed from priority school to reward school status. Neely's Bend then achieved significant improvement in student academic growth also under his leadership.

As Neely's Bend principal, Dr. Danhausen was tasked with not only leading the school, but also developing a bench of talent to take on future school leadership positions. After leading the school for two years, he was promoted to chief operations officer overseeing operations for our network of six schools. Meghan Stowe, assistant principal of instruction at Neely's Bend was appointed principal. Ms. Stowe served as principal for two years and achieved level 5 TVAAS growth. At the end of the 2021/2022 school year, Ms. Stowe accepted a network leadership role and Dominique Torres was promoted principal. Prior to her promotion, Dominique Torres served as assistant principal of instruction for Neely's Bend. Dominique Torres serves as an example of the LEAD talent development strategy in action. She began as a Teacher at LEAD Neely's Bend six years ago and was identified as a high potential leader. She was coached and developed into an Instructional Coach, then assistant principal of instruction.

LEAD understands success in priority school turnaround requires experienced executive and school leadership. In 2018 LEAD announced a comprehensive talent strategy to develop current leaders and calibrate leadership talent across our network of six schools. 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 instructional managers to CEO. Our unique leadership development and talent strategy, includes individual 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.

An essential component of our LEAD human capital strategy is to continuously develop talent with a goal of filling leadership roles internally. While LEAD Neely's Bend has been led by multiple school principals since its inception, 100% of those individuals have been internal candidates, either as principals from another LEAD school or as assistant principals identified as highly capable leaders in our network. Each was tasked with not only leading the school, but continually developing their direct reports to ensure a pipeline of future school leaders.

(h) Include a copy of the school's employee manual and personnel policies as Attachment H.

See attached.

- (i) 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.

Position	Year 1 Under Charter Commission
Principal	1.00
Asst Principal of Instruction	2.00
Asst Principal of Students	1.00
Dir of School Operations	1.00
Instructional Manager	4.00
Instructional Manager: ELL	1.00
Assistant Director of Data & Assessment Tech	1.00
Classroom Teachers	19.00
EL Teachers	5.00
Other Classroom Teachers (e.g. physical education, music, foreign language, etc.)	3.00
Reading Interventionist	4.00
Media Specialist	1.00
Substitute- LT	2.00
ExEd Instructional Manager	1.00
Exceptional Education Teacher	5.00
ExEd Assistant	3.00
Counselor	2.00
Student Support Coordinator	3.00
Family Engagement Coordinator	1.00
Office Manager	1.00
Receptionist	1.00
Operations Associate	1.00
Total Staff	63.00

2.4 Insurance

In this section:

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

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 LPS 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.*

LEAD offers transportation to its students by contracting services through a 3rd 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.

In accordance with State Law and mirroring MNPS policy, LEAD will establish "parent responsibility zones" (sometimes referred to as "walk zones"), the following distance from all schools. Transportation to and from school is the responsibility of their parent or guardian within the parent responsibility zone. Students who live within the parent responsibility zone and whose IEPs document a need for transportation supports will still be eligible for special transportation services.

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 7 general education and 1 special education today to 10 general education and 2 special education 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.

- (b) What contingency plans does the school have if contracted services are no longer available if authorized by Commission?*

Not applicable. Our external agreement is not impacted by our authorizer.

(c) How does the school provide daily oversight of transportation and who serves as the transportation supervisor?

All transportation services are overseen by LEAD's COO, 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.

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.

(b) What contingency plans does the school have if contracted services are no longer available if authorized by Commission?

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.

(c) How does the school provide daily oversight of food services?

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.*

The primary concern of transitioning to a non-ASD authorizer is the potential to lose the lease to our current facility (see Section 2.2 above). This is mitigated by the three year runway we have to begin negotiations with MNPS to secure a permanent replacement if required. Other challenges identified are the potential need to move to a private food service provider (see Section 2.6 above) and the establishment of our new SIS (see (b) below).

(b) Student information management:

- i. All Charter Commission-authorized schools must adopt the Charter Commission's instance of PowerSchool. Describe how the school will prepare its school and staff for the adoption of a new student information system.*

LEAD Public Schools is already underway in adopting a new SIS for our Achievement School District schools and is coordinating efforts with a third party technology firm that specializes in rolling out new SIS. They are prepared to 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 COO, and is also supported by our data engineer.

(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.*

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 School's for Unlicensed Personnel on how to administer medication and administer first

aide. 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.

(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 Public Schools already manages the complexity of managing compliance monitoring within two LEAs, MNPS and the ASD, and plans to use those existing structures and practices to ensure compliance with the Charter Commission.

The chief operating officer is ultimately responsible for authorization compliance across our network and maintains an internal calendar and checklist of all required actions and documentations for each authorizer. At the school level, the director of school operations ensures that compliance monitoring occurs within each school building.

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 Charter Management Organization (if applicable)

In this section:

- (a) 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.

2.9 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.

T.C.A. Citation	Description of Statute	Proposed replacement policy or practice	How this waiver will increase student achievement
<p>TN EDUCATION STATUTE: 49-3-306(a)</p> <p>STATE BOARD RULE: 0520-1-2-.02</p>	<p>Licensed Personnel Salaries</p>	<p>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.</p>	<p>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.</p>
<p>TN EDUCATION STATUTE: 8-23-206(a)</p>	<p>Longevity Pay</p>	<p>LEAD Board approves total salaries and wages during annual budgeting process and LEAD's Senior Leadership Team (SLT) may approve incentive, stipend, or other additional compensation structures that compensate staff for years of consistent student performance and professional development growth, not just years of service.</p>	<p>Public monies will be used properly to ensure personnel will be paid adequately, however it is critical to the LEAD program that the compensation system reflects the individual school's purpose and philosophy. Teachers may be given incentive pay that will compensate them for years of consistent student performance, not just years of service.</p>

<p>TN EDUCATION STATUTE: 49-5-401</p>	<p>Teacher Assignment</p>	<p>LEAD SLT approves annual calendar and school schedules.</p>	<p>LEAD will utilize an extended schedule, including increased instructional, as well as professional development hours. Teachers receive competitive compensation commensurate with increased work responsibilities.</p>
<p>TN EDUCATION STATUTE: 49-6-304A (2)-D</p> <p>STATE BOARD RULE: 0520-1-3-.03(4)</p>	<p>School Term Vacations and Other Non-Instructional Days</p>	<p>LEAD SLT approves annual calendar and school schedules.</p>	<p>LEAD operates with an extended school year including additional school days in summer along with an extended school day from 7:30 a.m. – 4:00 p.m. (may vary somewhat due to transportation logistics, staggered start times across schools, etc.).</p>

<p>TN EDUCATION STATUTE: 49-5-5002-5010, 49-5-5206-5209, 49-5-5301, 49-5-5304-5306, 49-5-5401, 49-5-5405, 49-5-5406, 49-5-5501, 49-5-5504-5506</p> <p>STATE BOARD RULE: 0520-2-2</p>	<p>Career Ladder</p>	<p>LEAD Senior Leadership Team (SLT) 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.</p>	<p>LEAD develops its own career path structures in order to create the highest quality teaching and leadership force.</p>
<p>TN EDUCATION STATUTE: 49-5-5205</p> <p>STATE BOARD RULE: 0520-1-1-.01</p>	<p>General Requirements for Evaluation</p>	<p>LEAD Senior Leadership Team (SLT) 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.</p>	<p>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, and 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.</p>

<p>TN EDUCATION STATUTE: 49-5-5205</p> <p>STATE BOARD RULE: 0520-2-1-.03</p>	<p>Evaluation of Third-Year Apprentice Educators</p>	<p>LEAD school leadership evaluates campus level staff based on performance evaluation structures overseen by LEAD SLT.</p>	<p>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.</p>
<p>TN EDUCATION STATUTE: 49-5-5302, 49-5-5402, 49-5-5408, 49-5-5502</p>	<p>Evaluation of School leaders, Assistant principals and Supervisors</p>	<p>LEAD SLT oversees performance evaluations of all school leaders and assists with evaluations of assistant principals, school directors, deans, and various supervisors as needed</p>	<p>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.</p>
<p>TN EDUCATION STATUTE: 49-5-408-409</p> <p>STATE BOARD RULE: 0520-2-2(2)</p>	<p>Evaluation Contracts and Termination of Contracts</p>	<p>LEAD Senior Leadership Team (SLT) 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.</p>	<p>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.</p>

<p>TN EDUCATION STATUTE: 49-5-501-513</p>	<p>Tenure</p>	<p>LEAD Senior Leadership Team (SLT) 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.</p>	<p>As a charter school, LEAD must be performance driven. Therefore, all employees of LEAD will be “at-will.”</p>
<p>TN EDUCATION STATUTE: 49-5-101(a)</p> <p>STATE BOARD RULE: 0520-1-2-.03(6)</p>	<p>Licensed School leaders</p>	<p>LEAD provides significant internal and external training resources for all school leaders and also prepares aspiring leaders through its resident school director program.</p>	<p>LEAD will recruit the most qualified school leaders from around the country to fulfill its mission.</p>
<p>TN EDUCATION STATUTE:</p> <p>STATE BOARD RULE: 0520-1-3-.07(2)</p>	<p>Library Information Center Personnel</p>	<p>LEAD schools provide students with access to classroom libraries, and on-site internet access at school.</p>	<p>Library resources are available to students through the public library system, internet resources at school, and via classroom libraries.</p>

<p>TN EDUCATION STATUTE: 49-3-316</p>	<p>Local Fiscal Accounting</p>	<p>The LEAD Board approves the budget through an annual process.</p>	<p>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.</p>
<p>TN EDUCATION STATUTE: 49-6-4012(b)</p>	<p>Formulation and Administration of Behavior and Discipline Codes</p>	<p>LEAD SLT approves student handbooks and discipline policies.</p>	<p>While parents and students will undergo due process, it is important that the discipline practices of LEAD provide a safe and effective learning environment for all students.</p>
<p>TN EDUCATION STATUTE: 49-6-2206</p>	<p>Use of Unapproved Textbooks</p>	<p>LEAD SLT approves use of curricular materials.</p>	<p>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.</p>
<p>TN EDUCATION STATUTE: 49-3-311</p> <p>STATE BOARD RULE: 0520-2-2(2)</p>	<p>Capital Outlay</p>	<p>LEAD Board approves all facility contracts and leases.</p>	<p>Because charter schools must finance their own buildings and do not have the power to raise taxes to fund capital outlay, it is critical that LEAD gain freedom from non-health and safety standards for the school site and have control of the facility vested in the LEAD Board, rather than the local board of education. Having this freedom will allow us to use the school site resources most efficiently and effectively and align building choices with the LEAD mission and goals.</p>

<p>STATE BOARD RULE: 0520-1-3-.05</p>	<p>Health, Physical and Wellness Education Curriculum</p>	<p>LEAD SLT approves annual calendar and school schedules including time for student health and well-being through physical activity.</p>	<p>Students will be involved in physical education activities each week. The School Leader will oversee these classes and work to ensure that the PE curriculum meets state content standards and may include the use of non-certified instructional personnel.</p>
<p>STATE BOARD RULE: 0520-1-3-.05</p>	<p>Fine Arts Curriculum</p>	<p>LEAD SLT approves annual calendar and school schedules including fine arts programming.</p>	<p>Students will be involved in fine arts activities incorporated into their general education classes. Fine arts classes may be taught by volunteers. The School Leader will oversee these classes and work to ensure that the fine arts curriculum meets state content standards, and may include the use of non-certified instructional personnel.</p>
<p>TN EDUCATION STATUTE: 49-3-359(a)</p>	<p>Instructional Materials/Supplies</p>	<p>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.</p>	<p>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.</p>
<p>TN EDUCATION STATUTE: 49-1-302(e)</p>	<p>Duty Free Lunch</p>	<p>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.</p>	<p>Allowing teachers flexibility in their day aligns to our goal of professionalizing the teaching profession and yields to better teacher retention and student outcomes.</p>

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 SY2022-23 and a projected budget for SY2024-25 if authorized by the Charter Commission as Attachment K. 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. Student enrollment in SY22-23 and SY23-24 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 are including in Attachment K/M the current board approved budget for LEAD Neely's Bend, a 24-25 Neely's Bend budget and a 24-25 LEAD Public Schools consolidated budget. The three budgets are provided without assumptions (for clarity and easy comparability) and then the same budget is presented with

assumptions for greater detail.

3.2 Budget Narrative

In this section:

As Attachment L, present a budget narrative including detailed descriptions of budget assumptions, and revenue and expenditure projections. The narrative must include:

- (a) An explanation of student enrollment, TISA projections, and the anticipated transition from BEP to TISA;*
- (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.;*
- (c) An explanation of all anticipated expenditures including those identified in Section 3.1(b);*
- (d) An explanation of who is responsible for the school's financials (both school level and governing board level);*
- (e) The school's contingency plans to meet financial needs if anticipated revenues are not received or are lower than expected;*
- (f) 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).*

See attached for the L: Budget Narrative.

3.3 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 M, 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:*
 - o Local, state, and federal per-pupil funding; eligibility levels; and annual increases;*
 - o Other government resources;*
 - o Private fundraising;*
 - o eRate; and*
 - o 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.

SECTION 4: PORTFOLIO REVIEW/PERFORMANCE RECORD

4.1 Past Performance

NOTE: While this section is required for all applicants, some questions may not apply to schools that are single-site operators. Please mark not applicable where necessary.

The Charter Commission will obtain from the ASD copies of the last three years of the school's School Performance Framework, and this information will be included in any review of the school's application. Upon submission of a letter of intent, the Charter Commission will provide the applicant with a completed data template of the following state accountability data for the last three available years:

- i. Success rate of the school*
- ii. Overall TVAAS Composite Score and subject-level composite scores*
- iii. Academic Proficiency Data for ELA/Math, including all subgroups.*
- iv. Chronic absenteeism rates*
- v. Remand and expulsion rates*
- vi. High school graduation rates (if applicable)*

In this section:

- (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.*

See the final attachment for confirmation from the ASD for exiting the Priority List. See Section 1.4: Academic Performance Standards for a detailed description on how the school achieved priority exit status.

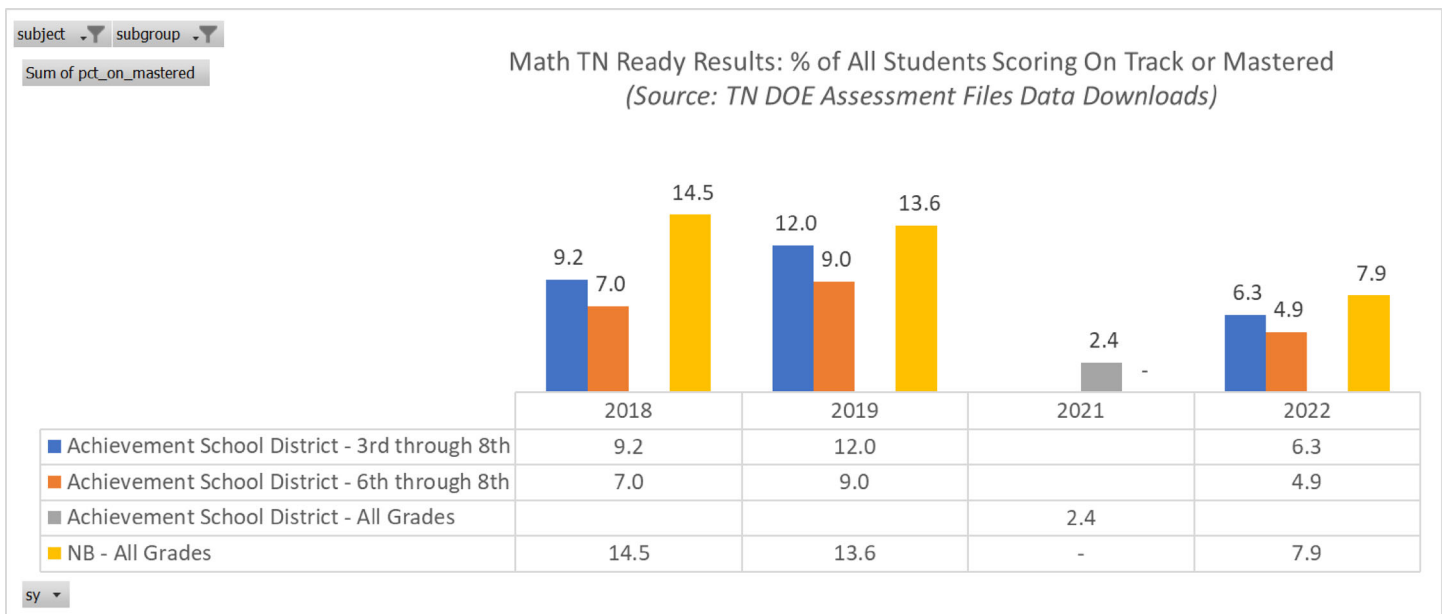
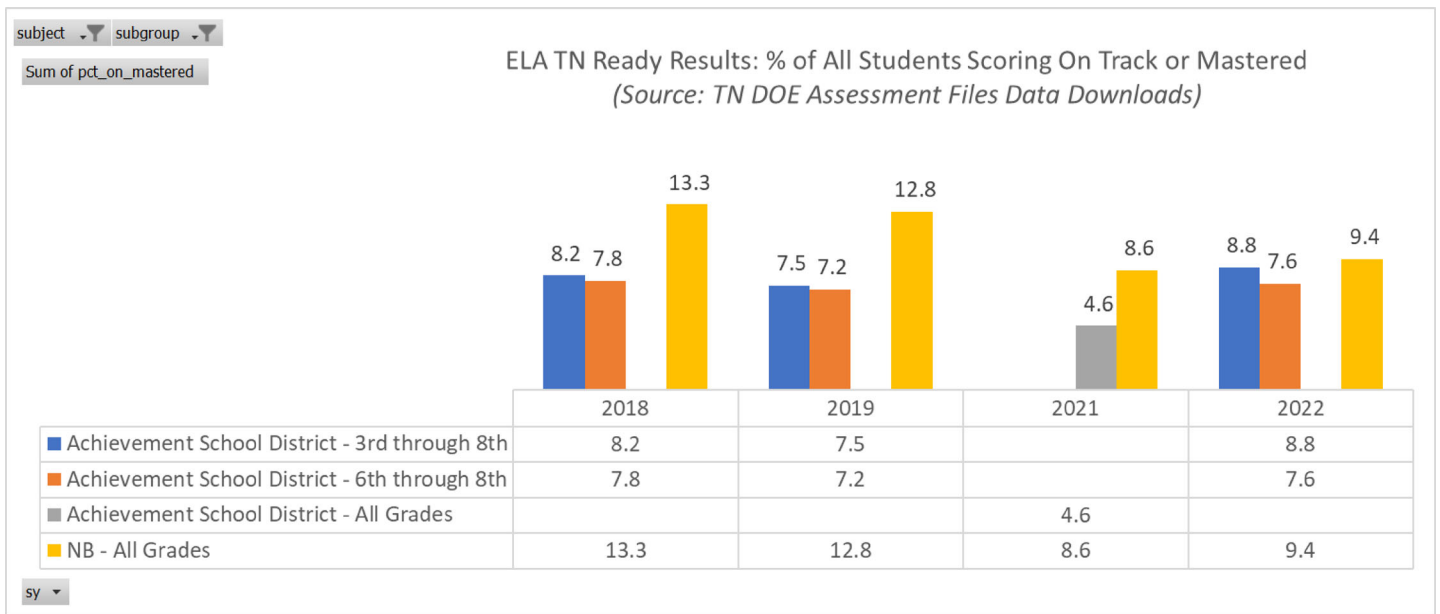
- (b) Based on the state accountability data provided to you by the Charter Commission, describe why you determined that the school's academic achievement and growth are a success and deserve continued authorization by the Charter Commission based on the Commission's scoring rubric.*

Since 2018-2019 LEAD Neely's Bend has consistently maintained our overall TVAAS composite of a 5 and has recently exited the Priority List by no longer falling within the bottom 5% of schools in the state for achievement in math and ELA. In terms of absolute achievement in 2022, Neely's Bend is the second highest performing middle school in both ELA and Math in the Achievement School District and regularly exceeds ASD averages in both subject areas (see graph below). Even during the pandemic, LEAD Neely's Bend continued to see proficiency several percentage points higher than the Achievement School District as a whole in both ELA and Math.

While there was a significant dip in scores during the pandemic, LEAD Neely's Bend maintained its strong growth and showed a significant bump in performance the year after the pandemic, doubling math scores and increasing ELA scores by a percentage point.

In summary, we have met the academic standards set by the state and the ASD, consistently shown outsized growth results and have exceeded district averages in proficiency. LEAD Neely's Bend has exited the Priority List and has a clear plan in place to continue an upward trajectory of results. (See section 1.3:

Academic Focus and Plan for further details on how we plan to continue this trend.)



LEAD Neely's Bend	2018	2019	2020	2021	2022
Success Rate of the School	18.1	17.2	N/A	-	-
Overall TVAAS Composite Score	5	5	N/A	5	5
TVAAS Subject-level (ELA)	5	5	N/A	4	3
TVAAS Subject-level (Math	3	3	N/A	4	5

(c) Describe the trajectory of the charter school's academic performance during the duration of its charter term under the ASD using the data included within the provided data template. Discuss any challenges the school has faced in its charter term and how the school adjusted to overcome those challenges.

In ELA and math we saw a significant drop in scores during the pandemic with a slight increase in ELA and significant increase in math as we came back to full time school. Two main challenges we have faced during our charter term are a changing student demographic and the pandemic. When LEAD Neely's Bend first opened it was 70%+ African American with a small Latino and White population. While our white population has stayed consistent, we now our 50% latino and 40% African American. This required us to rethink our ELA, math and EL practices at the school as we were forced to integrate a greater number of EL students. We changed our ELA curriculum, developed a number of scaffolds within all our classes, expanded our EL staff, and provided direct training to teachers around working with students who are second language learners. As for the pandemic, we, as did most other districts, pivoted to online school. When we returned our students had a number of pandemic gaps, and as a result we have invested heavily in MTSS services to provide additional support that will accelerate student learning and close the even wider achievement gap that now exists.

(d) 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](#).

Our remand and expulsion rates have remained at 0% year over year. While we made significant progress in lowering keeping Chronic Absenteeism (CA) rates below or at district averages prior to the pandemic, during the pandemic our CA rates skyrocketed. To this end, we have hired a manager of CA at the school level and worked with them to design and implement a CA program that focuses on Average Daily Attendance and the truancy process. This year we are currently meeting our double AMO and within the next 18 months expect to return to pre-pandemic levels of attendance and continue to lower CA rates to below 15%.

LEAD Neely's Bend	2018	2019	2020	2021	2022
Chronic Absenteeism	18.3%	17.0%	17.5%	30.3%	39.4%
Remand Rates	0%	0%	0%	-	-
Expulsion Rates	0%	0%	0%	-	-

(e) 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](#).

Our subgroup proficiency scores tell a mixed story. In ELA from 2018-2019 we saw an ~1-2% decrease in

all student groups, outside of EL transitional students, 1-4, where we saw an approximate 1% increase. During the pandemic scores decreased significantly across subgroups by ~5% and then post pandemic we saw scores improve by ~2-3% across subgroups. Specifically, we narrowed the gap in ELA achievement between all students and both our super sub-group and Black sub-group by 1-2%. Areas where we have seen a significant drop in achievement are in our transitional EL students and our economically disadvantaged students, where students did not show an academic recovery after the pandemic. Lastly, our students with disabilities group remained at below 5% of students showing proficiency whether during or outside of the pandemic.

In math it is a similar story. From 2018-19 we saw rather steady state scores across sub groups. During the pandemic our subgroup performance dropped significantly and in 2022 recovered by 1-3%. Successes exist in that our Hispanic students have either maintained or increased their performance in relation to our all students group. Further, our economically disadvantaged group and our EL group performed on level with our all students group. We have shown continued issues in math with developing proficiency in our students with disabilities.

LEAD 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) Expansion of MTSS services including dedicated Reading Intervention teachers.
- 2) Continued adoption of common, rigorous curricula across ELA, math, social studies, and science.
- 3) Additional administrative support in the form of assistant principals and instructional managers dedicated to EL and ExEd. These additional hires expand to our network team where we have doubled the size of our ExEd and EL teams in the past six months.
- 4) A continued focus on EL and ExEd populations that reflects our changing student demographic as demonstrated through the development of a EL newcomer academy at Neely's Bend, augmented curricula, ELlevation as a platform for student ILPs, differentiated MTSS options for all students but specifically the EL and ExEd subgroups, and work with Formative Language Assessments as predictors of student success on ACCESS and TNReady.
- 5) We have expanded 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 whom are dedicated to counseling and family outreach.
- 6) We have hired a 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.
- 7) We have invested in data driven instruction services that function within our curriculum to align assessment strategies, culminating in predictive interim assessments.

(f) Given the previous interruption in state testing data, please provide 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.

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. Data are analyzed with

a lens on determining student growth overall and by subgroup.

See below for MAP growth data before, during and after the period of pandemic-related remote learning. The story this data tells mirrors that of TNReady achievement over the past three years. To close the achievement gap, our students must make more than one year's growth in both ELA and math each year. In both content areas, we saw significant slowdown in growth during the 19-20 school year when we switched to remote learning. We then saw accelerated growth in the 20-21 school year, which has resulted in making up a portion of pandemic related learning loss. In ELA, we saw significant growth of between 1.5 and 2.1 equivalent years, and we accelerated our growth from prior to the pandemic in every grade level. In Math, while we continue to see a minimum of one years growth in three of four grades, we have not seen the same rate of acceleration as ELA, nor have we achieved the growth necessary to meet our achievement goals. These results, along with Math TNReady Results, were the origination of hiring a dedicated math assistant principal of instruction and math instructional managers to better support our teachers in their specific content area.

LEAD NEELY'S BEND: AVERAGE YEARS OF GROWTH - NWEA MAP READING			
Grade	2018-2019	2019-2020	2020-2021
5	1.7	0.8	1.9
6	1.2	1.1	2.1
7	1.4	0.9	1.7
8	1.1	0.8	1.5

LEAD NEELY'S BEND: AVERAGE YEARS OF GROWTH - NWEA MAP MATH			
Grade	2018-2019	2019-2020	2020-2021
5	1.0	0.45	1.1
6	1.4	0.68	1.0
7	1.2	0.99	1.1
8	1.3	1.2	0.89

(g) Describe why the school's operational and financial performance qualifies it for continued authorization under the Charter Commission.

LEAD Public Schools has a proven track record of meeting or exceeding all operational and financial performance indicators set by its authorizers. 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. 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. LEAD is managed by an experienced network team and has proven leaders in key roles such as CEO, head of schools, CFO, CAO and COO.

- (h) 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.*

Not applicable.

- (i) 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.*

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

- (j) Provide, as Attachment N, 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.*

See attached.

- (k) For all schools operating in the state of Tennessee: provide the following in Attachment O: (a) the last two years of audited financial statements for each school or school(s); and (b) the most recent internal financial statements, including balance sheets and income statements.*

See attached.

- (l) Identify any current or past litigation, including arbitration proceedings, that has involved the network or any charter schools it operates. Provide in Attachment P, if not subject to confidentiality protection: (1) the demand, (2) any response to the demand, and (3) the results of the arbitration or litigation*

Not applicable.

ATTACHMENTS

- ATTACHMENT A: Annual Academic Calendar and School's Daily Schedule by Grade
- ATTACHMENT B: Student Handbook/School Forms
- ATTACHMENT C: Student Discipline Policy
- ATTACHMENT D: Enrollment Policy
- ATTACHMENT E: Letters of Support/MOUs/Contracts from the Community
- ATTACHMENT F: Governance Documents
- ATTACHMENT G: School Organizational Chart
- ATTACHMENT H: Employee Manual/Personnel Policies
- ATTACHMENT I: Insurance Coverage
- ATTACHMENT K & M: SY22-23 Approved Budget and SY23-24 Projected Budget AND Network Financial Plan
- ATTACHMENT L: Budget Narrative
- ATTACHMENT N: School Reports/Authorizer Evaluations
- ATTACHMENT O: Audited financial statements and most recent internal financial statements
- ATTACHMENT Q: Original approved charter application
- ATTACHMENT R: Original approved charter agreement with the ASD

A. Annual Academic Calendar

2022-2023 LEAD Public Schools Master Calendar						
July 2022						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
August 2022						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			
September 2022						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	
October 2022						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					
November 2022						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1	2	3	4
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			
December 2022						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

***DRAFT WILL FINALIZE & UPDATE WHEN ALL ADDITIONAL DATES ARE RELEASED

Color and Notation Codes	
	LEADership Institute
	School Based Professional Development
	Schools Closed
	Teacher PD, Students Do Not Report
	Early Dismissal for All Students
	Parent Teacher Conferences - No students
	Early Dismissal for High School Exams

Grading Periods	
1st Quarter:	8/08/22 to 10/6/22
2nd Quarter:	10/17/22 to 12/16/22
3rd Quarter:	1/9/23 to 3/10/23
4th Quarter:	3/20/23 to 5/25/23

Other Dates	
LEAD Student Survey Window- 1st Admin-	Aug 29- Sept 9th
Student Survey Window- 2nd Admin-	March 22- April 8
***ELA Unit Assessment 1x per quarter by end of quarter	

Junior Seminar Princeton Review PRACTICE ACT Administration	1st Admin-	Aug 15-Aug 19
	2nd Admin-	Nov 14-Nov 18
	3rd Admin-	Jan 23-Jan 27
ELA Mock TN Ready - March 20-April 14th		
SS Mock TN Ready - March 20-April 14th		
SCI Mock TN Ready - March 20-April 14th		
TNTP Walkthroughs	October 24-27	February 6-10
Coaching PLCS 8:00-11:00am	9/1 Neely's Bend	12/8
	10/6 Brick Church	
	11/3	
Network PLCS	HS	MS
	9/2 9:00-11:00am	10/7 9:00-11:00am
	11/8 9:00-11:00am	1/3 1:00-3:00pm
	1/3 9:00-11:00am	2/20 9:00-11:00am
Principal Meetings	8/16, 9/20, 10/18, 11/15, 12/20, 1/24, 2/21, 3/21, 4/18, 5/16, 6/20	

TEAM Windows:			
Round	Type	Rubric(s)	Date
1	Announced	Planning, Env., Instr., Draft Prof.	Sept. 6- Oct. 21
2	Unannounced	Planning, Env., Instr., Draft Prof.	Oct. 24-Dec. 9
3	Announced	Instr., Draft Prof.	Jan. 30-Mar. 9
4	Announced	Final Professionalism	By April 14

[Additional information about TEAM windows can be found here.](#)

LEAD Assessments		
MAP Testing Windows:	Fall Window: MAP (5th-10th) - August 22-26	
	Winter Window: MAP (5th-10th) - January 9-20	
	Spring Window: MAP (5th-10th) - May 8-19	
High School Semester Exams:	December 12-December 15th (December 16-Make-up)	
	May 19 & May 22-May 24 (May 25-Make-up)	
Anticipated ACCESS Testing Window:	Subject to change: 2/13 - 3/31	
TNReady/ EOC Testing Window:	Subject to Change before State Official Release: April 17th- May 5th (May 2nd for 5th graders) TCAP ALT/MSAA March 13-April 28 (Official release by state August TBD)	
AP Exam Window	May 1st-May 12th	
Math Interim Assessment Windows:	Math Interim (MS IA1) - Oct 3-6	
	Math Interim (MS IA2 & HS Semester Exams) - Dec. 5-15	
	Math Interim (MS & HS Mock TNReady) - March 3-9	
	Math Interim (HS Semester Exams) - May 19-25	
FastBridge Screening Windows:	FastBridge Fall Screening Window	8/1-8/22
	FastBridge Winter Screening Window	11/21-12/16
	FastBridge Spring Screening Window	5/1-5/26
HIGH SCHOOL ACT/PSAT (Subject to MNPS Finalization)	Senior ACT October 4 Online	Accommodations must be submitted by Aug 20th
	Junior ACT March 7th	Accommodations must be submitted by Dec 20th
	PSAT- October 25th	
AAPPL Testing	Aug 22- Sep 1	
	Nov 14-Nov 22	
	Mar 20-Mar 31	
Formative Language Assessment	(Benchmarking/Initial Window):	8/22 - 9/16
	Window 1:	9/19 - 10/21
	Window 2:	10/31 - 11/11
	Window 3:	11/14 - 12/16
	Window 4:	1/17 - 2/3
	Window 5:	2/13 - 3/24
	Window 6:	3/27 - 4/14

			December 20
			January 24
			February 21
			March 21
			April 18
			May 16
			June 20

A: School's Daily Schedule by Grade

Student Schedules			Monday - Thursday													
			5th Grade		6th Grade				7th Grade				8th Grade			
8:30 AM	8:57 AM	HR	5.1	6.1	6.2	6.3	6.4	7.1	7.2	7.3	7.4	8.1	8.2	8.3	8.4	
9:00 AM	9:44 AM	1	Electives	Math	Electives and PLT	A: Science B: Social Studies	Math	ELA	Electives and PLT	A: Social Studies B: Science	Math	A: Science B: Social Studies	Math	Electives and PLT	Electives and PLT	
9:47 AM	10:31 AM	2	PLT													
10:34 AM	11:18 AM	3	Math	ELA	Math	Electives and PLT	ELA	Math	Math	Electives and PLT	ELA	Electives and PLT	Electives and PLT	Math	ELA	
11:21 AM	12:05 PM	4														
12:08 PM	12:52 PM	5	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	A: Science	ELA	Math	A: Social Studies	Math	ELA	A: Social Studies	A: Science	
12:55 PM	1:39 PM	6	ELA	A: Science B: Social Studies	ELA	Math	A: Social Studies B: Science	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	
1:42 PM	2:26 PM	7						B: Social Studies	ELA	Math	B: Science	Math	ELA	B: Science	Math	ELA
2:29 PM	3:13 PM	8	Science Social Studies	Electives and PLT	A: Social Studies B: Science	ELA	Electives and PLT	Electives and PLT	A: Science B: Social Studies	ELA	Electives and PLT	ELA	A: Social Studies B: Science	ELA	Math	
3:16 PM	4:00 PM	9														
Friday																
			5th Grade		6th Grade				7th Grade				8th Grade			
8:30 AM	8:50 AM	HR	5.1	6.1	6.2	6.3	6.4	7.1	7.2	7.3	7.4	8.1	8.2	8.3	8.4	
8:53 AM	9:33 AM	1	Electives	Math	Electives and PLT	A: Science B: Social Studies	Math	ELA	Electives and PLT	A: Science B: Social Studies	Math	A: Science B: Social Studies	Math	Electives and PLT	Electives and PLT	
9:36 AM	10:16 AM	2	PLT													
10:19 AM	10:59 AM	3	Math	ELA	Math	Electives and PLT	ELA	Math	Math	Electives and PLT	ELA	Electives and PLT	Electives and PLT	Math	ELA	
11:02 AM	11:42 AM	4														
11:45 AM	12:25 AM	5	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	A: Science	ELA	Math	A: Social Studies	Math	ELA	A: Social Studies	A: Science	
12:28 PM	1:08 PM	6	ELA	A: Science B: Social Studies	ELA	Math	A: Social Studies B: Science	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	LUNCH	
1:11 PM	1:51 PM	7						B: Social Studies	ELA	Math	B: Science	Math	ELA	B: Science	Math	ELA
1:54 PM	2:34 PM	8	Science Social Studies	Electives and PLT	A: Social Studies B: Science	ELA	Electives and PLT	Electives and PLT	A: Science B: Social Studies	ELA	Electives and PLT	ELA	A: Science B: Social Studies	ELA	Math	
2:37 PM	3:17 PM	9														
3:20 PM	4:00 PM	10	Team Time	Team Time				Team Time				Team Time				



Student and Family Handbook
“Ready for College, Ready for Life”

1251 Neely's Bend Road
Nashville, TN 37115
Phone: (615) 645-6461

Website: <https://leadpublicschools.org/schools/neelys-bend/>

The content that follows is the LEAD Neely's Bend 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 Neely's Bend 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 Neely's Bend 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 Neely's Bend 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 Neely's Bend 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 Neely's Bend, we believe in giving all students the opportunity to be academically successful by ensuring students get multiple at bats 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 Neely's Bend:* 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 Neely's Bend:* 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 Neely's Bend:* 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.

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 Neely's Bend, 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)	93-100	Exceeds Standard / Advanced
B (3.0)	85-92	Meets Standard / Proficient
C (2.0)	75-84	Nearing Standard / High Basic
D (1.0)	70-74	Nearing Standard / Low Basic
F (0.0)	50-69*	Below Standard / Below Basic

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 student's final grade. See grading categories and the final grade percentages below.

Summative (35%)	Summative Quiz (35%)	Formative (30%)	Formative (30%)
Tests/Project/Essay	Quizzes	Classwork	Exit Tickets

Paychecks and Report Cards

In order to ensure we communicate student academic progress consistently with parents, paychecks are distributed every Monday to LEAD Neely's Bend students. Paychecks will include a summary of attendance, behavior and academics. Signed paychecks must be returned on Tuesday, to your students' homeroom teacher.

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 class.**

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 paychecks or report cards for his or her child, please contact your child's homeroom teacher or the front office immediately. See LEAD Neely's Bend 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 Neely's Bend 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 Neely's Bend.

School-Wide Systems

Dress Code

Students are expected to be in uniform 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 uniform so that students are prepared for class without wardrobe distractions. Here are the dress code specifics:

- **Shirts**

- **All grades:** Students must wear a black polo. Students will receive one polo when they enroll. They may also wear plain, black polos without large logos
- During cold months, students may wear any solid color long sleeve shirt underneath their polo
- **Pants**
 - Black, or tan khaki pants
 - Pants must be professional “khaki/docker” material
 - No jeans, no leggings, no other color pants
 - Students may wear black, 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; No Crocs
 - Students can wear any color shoes they’d like as long as they are closed-toe
 - Students may wear sneakers, boots, flats
 - Students may not wear sliders or sandals
- **Outerwear**
 - Sweatshirts or hoodies are permitted if they are a:
 - LEAD Neely’s Bend logo
 - College name or logo
 - Solid black
 - The uniform black 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 Neely’s Bend or college logo, the student will simply take it off when entering the building and store it on designated racks throughout the school.
- **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 Neely’s Bend 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 earned a paycheck of \$128, by Thursday, they are able to wear jeans on Friday.

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 before entering school
- Once inside the school building, ask permission to shut off phone if you haven't already
- Students are 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 never 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 8:30-9:00.

Our cafeteria does sell small bags of chips that students are allowed to eat during lunch. Please be aware that in order to purchase snacks from the cafeteria, families must add money to school accounts as cash is not accepted.

Students are not allowed to eat in class. Students **MUST** 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.

Merits

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 merits, (+3 and +1) that encourage the behavior.

The following table provides a non-exhaustive list of behaviors that may earn various merits as well as anything notable about particular merits.

Type of Merit	Examples
Excellent Academic Behavior (+3)	<ul style="list-style-type: none"> • Asking questions • Giving, accepting, or applying feedback • Great collaboration with partner/group
Bounce Back (+1)	<ul style="list-style-type: none"> • “Great job bouncing back and getting on task with your turn and talk partner”
Modeling Expectations (+1)	<ul style="list-style-type: none"> • Meeting expectations as clearly stated <ul style="list-style-type: none"> ◦ Ex: “Sarah is modeling expectations, holding her pen as she reads to make margin notes.”

Positive Attitude (+1)	<ul style="list-style-type: none"> • Warmly greets teacher and others • Brings joy to classroom
Ready to Learn (+1)	<ul style="list-style-type: none"> • Has all materials ready to go • Body language communicates he/she is engaged

Ethos and Positive Points

Our Ethos are the following: Serve Others, Committed, Courageous, Self-Reliant and Disciplined. Students can earn +5 Beaver Bucks for displaying behaviors that exemplify these Ethos. We want to encourage those behaviors to serve as examples for both the student and his or her peers. Our goal with awarding Ethos points (+5) is to recognize when students are going outside of the normal expectations, showing a commitment to our Ethos, and living out our values as a school.

Correction and Consequence

Reminders

Reminders refer to the response to actions that distract from or deter the learning process. These actions 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. We want to be consistent with our expectations and consequences, so reminders are not warnings, they are *reminders* about how to have positive habits in the classroom.

Reminder	Examples
Talking (-1)	<ul style="list-style-type: none"> • Talking out of turn • Inappropriate volume
Off Task (-1)	<ul style="list-style-type: none"> • Reading a book instead of focusing on lesson • Drawing on paper • Falling asleep • Putting on Makeup in class • Writing on your body or clothes • On wrong (but appropriate) website during class • Off task conversations in work groups
Disruptive (-1)	<ul style="list-style-type: none"> • Kicking the table or chair (non-aggressively) • Making any unnecessary noises in class or at whole school events • Pencil tapping, drumming, singing/rapping in class • Slamming book or door • Phone rings in class • Sound effects on computer turned up on purpose
Wearing Hood/Unapproved Jacket (-1)	<ul style="list-style-type: none"> • Outerwear does not meet school expectations • Wearing hood on head/neck inside the building <p>*These reminders should not be issued to students when they've just entered the school building. Examples: No hoods once you're through the vestibule, no unapproved outerwear</p>

once you're seated in first period until it's time to dismiss EOD.

Demerits

Demerits are used in times when students are clear on the expectations and are choosing not to follow them

. **All -5 demerits automatically trigger silent lunch for the student.** It is appropriate for these behaviors to automatically warrant a high level consequence because they are more immediately harmful to the culture of the school. An accumulation of **any three -3 demerits in the course of the culture week triggers the silent lunch consequence.** While not immediately detrimental to the school, if behaviors that earn -3 demerits persist or go unchecked, they can absolutely erode the culture of a school because not holding students accountable for these behaviors creates an environment in which expectations are unclear and inconsistent.

Type of Demerit	Examples
Dress Code (-3)	<ul style="list-style-type: none"> • Not in uniform pants • Wearing a hot pink shirt • Wearing a shirt without a collar • Wearing slides or slippers
Out of Area (-3)	<ul style="list-style-type: none"> • In stairwell or hallway when supposed to be in the cafeteria/gym • Leave line/classroom doorway to greet a best friend or teacher across the hall • Walking around classroom without permission • Using a bathroom assigned to a different grade level
Late to Class (-3)	<ul style="list-style-type: none"> • Enters classroom after the bell rings
Unprofessional Behavior (-3)	<ul style="list-style-type: none"> • Eating in class during instructional time • Horseplaying • Failure to turn in Progress Report or other signed form • Inappropriate use of school materials, including technology (ex: on explicit website) • Public display of affection • Seeking a different answer (one teacher says no, you ask another teacher) • Repeatedly not follow expectations
Cell Phone (-3)	<ul style="list-style-type: none"> • Using cell phone • Having cell phone out without permission
Academic Dishonesty (-5)	<ul style="list-style-type: none"> • Copying or cheating • Trying to change grades • Plagiarism • Not contributing to a group project
Disrespect (-5)	<ul style="list-style-type: none"> • Writing on school property or sticking/spitting gum not in trash can • Calling someone a negative name • Pushing/kicking/hitting someone with intention to harm • Using profanity directed at others • Refusing to follow a specific direction • Walking away from a staff member who is trying to talk with him/her (This does NOT include refusal to greet or respond to a greeting)

Skipping Class (-5)	<ul style="list-style-type: none"> • Hiding in bathroom • Lied to Student Support Coordinator about being sent to R&R to avoid class
---------------------	--

Silent Lunch

If a behavior warrants silent lunch, the student will report to silent lunch during lunch and recess that day. The student will be provided a reflective task, with the purpose being to restore the relationship and reflect on their behavior. The task is also for the student to learn to make better choices going forward. During silent lunch, students are not allowed to communicate, even silently. Students spend the time productively and are only allowed to talk to the adult in the room concerning their reflective task.

Student Culture & Support

Crew Rivers

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 rivers and we have five rivers school-wide: Rio Grande, Nile, Mississippi, Congo, and Amazon. Each staff member is assigned to a river 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.

Additional School Rules & Procedures

Topic & Rationale	Rule or Procedure
<p>Common hand signals</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"> • Pencil in air = sharpen pencil • Pointer finger in air = need a pencil/utensil • Raise ASL letter R (crossed fingers) = bathroom • One hand raised, one hand over nose = kleenex • Raised ASL letter T (fist with thumb between index and middle finger) = trash • Tap wrist = need more time
<p>Bathroom</p> <p><i>Class time is valuable. Students should be in classrooms at all times. There is also a safety piece involved. We are</i></p>	<ul style="list-style-type: none"> • Empty pockets and leave your bags in the classroom • You must have a pass • Three minutes or less to the bathroom • Two bathrooms per day in addition to breakfast and lunch • Leave the place cleaner than you found it • Bathrooms are closed 10 minutes prior to dismissal at the end of the

<p><i>responsible for students at any and all times of the day. This involves knowing their whereabouts.</i></p> <p><i>Specific bathroom time windows may be created if a pattern of destructive or unsafe behavior emerges.</i></p>	<p>day</p> <ul style="list-style-type: none"> ● 5th graders may only use bathroom in 5th hallway (unless in library or electives or at lunch) ● 6th graders may only use bathroom in between 6th and 7th hallway (unless in library or electives or at lunch) ● 7th graders may only use bathroom in between 6th and 7th hallway (unless in library or electives or at lunch) ● 8th graders may only use bathroom in 8th hallway (unless in library or electives or at lunch)
<p>Water</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"> ● Students are expected to bring a water bottle to school ● Students need to fill up water bottle on trips to the bathroom and during lunch/recess
<p>Sharpening Pencils</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"> ● Carry a hand held sharpener ● Use homeroom time to sharpen at least 3 pencils for the day ● Only sharpen pencils when the teacher is not providing direct instruction ● When you go to the sharpener, sharpen more than one pencil
<p>Nurse</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"> ● Students will only be sent for genuine need and absolute emergencies e.g. pink eye, throw-up, very high temperature, etc. ● 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” ● Teachers will use best judgment 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 ● The nurse will log students in and note name, class, reason for seeing nurse -- investigate reasons for repeat visitors
<p>Feminine supplies</p> <p><i>Students should arrive at school prepared.</i></p>	<ul style="list-style-type: none"> ● Students need to bring their own supplies, but can ask for them in the main office in the case of emergencies.
<p>Outside food</p>	<ul style="list-style-type: none"> ● Students and parents may bring in breakfast or lunch from outside restaurants.

<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"> ● 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 school day. ● Please refer to the previously stated rules in this appendix and in the LPS handbook regarding families bringing in lunch or treats
<p>Microwaving student lunches</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"> ● Students are never allowed to heat up lunch in the microwave or use the refrigerator to store packed lunch
<p>Writing on skin, clothes or shoes</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"> ● Students are not allowed to draw on their skin, clothes, or shoes ● Having writing on your clothing is breaking the dress code
<p>Prohibited supplies and materials</p> <p><i>We take pride in our school property and permanent markers & gum can be destructive to walls, desks, clothes, etc.</i></p>	<ul style="list-style-type: none"> ● Students may not bring sharpies or flair pens to school or chew gum. All sharpies and gum found will be taken from students ● Students may only use pencils and pens to complete classwork: no markers, flares, gel pens ● The following are never allowed at school: glass bottles, gum, and sharpies ● 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.

Procedure & 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 9:00am and ends at 4:00pm Monday-Friday. Doors open and homeroom begins at 8:30. 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 9:01am 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 Neely's Bend 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 Neely's Bend 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. LNB 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 he/she is 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 a 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 Neely's Bend 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 Neely's Bend 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

- At the end of each school day, we dismiss our walkers and car riders before our school bus riders.
- Walkers and car riders are escorted to the gym door closest to the side parking lot. Walkers are expected to immediately leave school premises and begin their journey home.
- If your child is a car rider, he or she will wait in the gym until they are ready for pick-up. You and your student(s) are expected to adhere to the following pick up rules to maximize student safety during dismissal:
 - All car riders must wait for their ride in the gym. There are staff stationed to help monitor students in this zone.
 - Cars must have the student name printed on white paper on the dashboard of their car. LEAD Neely's Bend will provide the sign to all families who proactively inform us of their car-rider status. Having the sign clearly posted on your dashboard will ensure a timely pick-up of your student.
 - A staff member will message for the students to be sent out from the gym at which point they will meet their car and leave school grounds.
 - Students may only leave the waiting zone when their car has arrived.
 - Students are NOT ALLOWED to walk to the MapCo or down the sidewalk toward Neely's Bend Elementary to get into a vehicle.
 - Students are NOT ALLOWED to return to campus once they have left.

Late Pick-up

- Adults stay with walkers and 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 not be supervised by a school staff member after 4:15pm.
- 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 Neely's Bend 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 Neely's Bend 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).

Personal Belongings

LEAD Neely's Bend 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, Talking Points 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, Blackboard or our social media pages (Instagram and Facebook).

Use of Tobacco

LEAD Neely's Bend promotes and maintains a smoke-free environment. All LNB 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 Neely's Bend 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.

LEAD Public School’s Family 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.

PARENT/STUDENT SIGNATURE PAGE
LEAD Neely's Bend
2021-2022

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 Neely's Bend 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

DISCIPLINE TABLES

Descriptions of response levels can be found below the discipline tables. You may also click directly on the response level to see its description.

DISCIPLINE TABLES: [Type 1](#) | [Type 2](#) | [Type 3](#) | [Type 4](#) | [Type 5](#)

RESPONSE LEVELS: [Level A](#) | [Level B](#) | [Level C](#) | [Level D](#) | [Level E](#) | [Level T](#)

Discipline Tables

Type 1 Behaviors

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
Tardy to School, Bus or Class	100	Arriving late to school, bus, class or activity.	A	No	No	No
Noncompliance With a Reasonable Request	102	Not following the reasonable request of a teacher, administrator or staff member.	A	No	No	No
Agitating Other Students	103	Unwanted and/or unreciprocated picking on or bothering of other students.	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	No	No	No
Possession of Fireworks	106	Knowingly possessing fireworks. Fireworks will be confiscated and not returned.	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	No	No	No

Type 2 Behaviors

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
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Repeated Violations of a Pattern of Same Type 1 Behaviors, With Evidence of Implemented Interventions	200	<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 & 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>	A, B, I	No	No	No
Possession of Tobacco Products	202	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.	A, B	No	No	No
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><i>-TCA Title 49, Chapter 2 and Title 49, Chapter 6.</i></p>	A, B	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, B	No	No	No
Gambling	208	Betting on games or activities for money or things of value.	A, B	No	No	No
Drug Paraphernalia	210	Possessing any material used to produce or consume illegal drugs. Drug paraphernalia includes, but is not limited to, bongos, roach clips, miniature spoons and pipes used to consume illegal drugs. All items will be confiscated and not returned.	A, B	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, B	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, B, I	No	No	No

Type 3 Behaviors

Behavior	Code	Definition	Response	Middle (Grades	Middle (Grades	Elementary (Grades K-
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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>	B , C , I	Yes	No	No
Profane or Indecent Language Towards Teacher or Staff	301	Directing profane or indecent language toward a teacher, staff member or administrator.	B , C , I	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.	B , C , I	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.	B , C	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.	B , C , I	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.	B , C , I	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.	B , C	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.	B , C , D , I	Yes	No	Yes*
<p><i>*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.</i></p>						
Indecent Exposure	308	Intentionally exposing body parts generally	B , C , I	Yes	No	No



		considered private. For shirts exposing cleavage, use Code 107 (Dress Code).				
Offensive Touching	309	Engaging in unwanted or offensive touching of areas generally considered private.	B, C, I	Yes	No	No
Fighting	311	Mutual participation in an incident involving physical violence. <i>*Elementary students may only receive OSS if fight results in injury.</i>	B, C, D, I	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.	B, C, I	Yes	No	No
Threats, Class 1	313	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. A Building Level Threat Assessment must be completed.	B, C, I	Yes	No	No
Possession of a Non-Lethal Weapon or Replica of a Lethal Weapon	314	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.	B, C, I	Yes	No	No
Inappropriate Use of Electronic Devices	315	Viewing or distribution of sexually explicit images/videos and/or fights (i.e., air drop, social media post, etc.) 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. 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. <i>-TCA Title 49, Chapter 2 and Title 49, Chapter 6</i>	B, C, I			
Possession of Other Weapons	317	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. Use of taser and/or pepper spray may result in higher level codes (i.e. 413 – Extreme Disruption or 420 – Reckless Endangerment)	B, C, D, I	Yes	No	No
Trespassing on School Grounds	318	Entering and remaining on school property or during school-sponsored activities without authorization. Parents will be called. If student	B, C	Yes	No	No



		remains on campus, law enforcement may be contacted.				
Inappropriate Physical Contact Toward School Staff	319	Engaging in intentional physical contact with MNPS staff that does not rise to level of bodily injury.	B, C, I	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).	B, C, D, I	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.	B, C, D, I	Yes	No	No

Type 4 Behaviors

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
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.	C, D, E	Yes	Yes	No
Assault of a Student	401	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). <i>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.</i>	D, E	Yes	Yes	Yes
Under the Influence of Illegal Drugs	402	Being under the influence of any illegal drug(s) while on school grounds or at school-sponsored activities. <ul style="list-style-type: none"> 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. 	C, D, E	Yes	Yes	No



- 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.
- 3rd offense: Level E response option

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>	D, E	Yes	Yes	No
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.</p> <p>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>	D, E	Yes	Yes	No
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> <ul style="list-style-type: none"> • Physically harming a student or damaging a student's property • Knowingly placing a student(s) in reasonable fear of physical harm or damage to the student's property • Causing emotional distress to a student(s) • Creating a hostile educational environment <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><i>*Elementary student OSS only if repeated over time and persists after documented administrative intervention.</i></p> <p>Hazing is an intentional or reckless act on or off MNPS property, by one student acting alone or with others,</p>	C, D, E	Yes	Yes	Yes*



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 with competition conducted under a coach's or sponsor's supervision.

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.	C, D, E	Yes	Yes	Yes*
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**Elementary OSS only if repeated over time and persists after documented administrative intervention.*

Harrassment

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.*

Based on a student's real or perceived sex, sexual orientation, gender identity, gender expression or appearance.

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 sex, sexual orientation, gender identity, gender expression, or appearance; and
3. Creates a hostile environment when the conduct is sufficiently severe, pervasive *and* objectively unreasonable 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: 410, 411.

**Elementary OSS only if repeated over time and persists after documented administrative intervention.*


Behavior	Code	Definition	Response	Middle (Grades 6-8) and High (Grades	Middle (Grades 6-8) and High (Grades	Elementary (Grades K-5) OSS
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				9-12) OSS	9-12) Expulsion	
Harassment Based on Race, Color or National Origin	407	See definition above.	C , D , E	Yes	Yes	Yes*
Harassment Based on Religion or Creed	408	See definition above.	C , D , E	Yes	Yes	Yes*
Harassment Based on Gender, Gender-Identity or Sexual Orientation	409	See definition above.	C , D , E	Yes	Yes	Yes*
Harassment Based on Disability	410	See definition above.	C , D , E	Yes	Yes	Yes*
Sexual Harassment	411	See definition above. <ul style="list-style-type: none"> 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). 	C , D , E	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.	D , E	Yes	Yes	Yes
Extreme Disruption of the School Environment or Bus	413	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 MNPS 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. <i>*Elementary administrators should use crisis response team.</i>	C , D , E	Yes	Yes	No*
Group Fighting	414	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. <i>*Elementary students may only receive OSS if the fight results in injury.</i>	D , E	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	C , D , E	Yes	Yes	Yes



		documented in the referral and in Support and Intervention.				
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.	C, D, E	Yes	Yes	No
Off Campus Behavior: <i>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</i>	417	Students may be subject to disciplinary action for off-campus behavior when: <ul style="list-style-type: none"> 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. 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. 	C, D, E	Yes	Yes	No
Sexual Assault	418	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. <ul style="list-style-type: none"> 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). 	D, E	Yes	Yes	Yes
Robbery	419	Intentionally or knowingly taking the property of another person by use of violence or with the use of a weapon.	D, E	Yes	Yes	Yes
Reckless Endangerment	420	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><i>* Elementary students may receive up to two days OSS for safety planning purposes only.</i></p>	D, E	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.	D, E	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.	D, E	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.	D, E	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.	C, D, E	Yes	Yes	No	

Type 5 Behaviors

Zero Tolerance Offenses

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.

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
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.	E	Yes	Yes	Yes*
Attempted Homicide	502	Attempting to kill another person.	E	Yes	Yes	Yes*
Homicide	503	Killing another person.	E	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).</p> <p>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>	E	Yes	Yes	Yes



- 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.
- 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.

Per MNPS Policy distribution based on possession constitutes the following:

1. Possession of 1 or more ounces of any controlled substance and/or legend drug (prescription).
2. Possession of 3 or more vapes containing an controlled substance.

Aggravated Assault of Teacher, School Staff or a School Resource Officer (SRO)	506 (ZT)	Intentionally or knowingly 1. Causing serious bodily injury or 2. 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.	E	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.	E	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.	E	Yes	Yes	Yes

Response Levels

Level A: teacher, student, parent, school staff

1. All relevant stakeholders (the teacher, student(s), or any other adult) involved in the behavior incident share their perspective on what happened and how they were impacted. The intent is to achieve resolution through mutual understanding and respect. Classroom expectations should be discussed and reiterated at this time.
2. The teacher will check-in with the student periodically to ensure the relationship has been restored and to encourage continual relationship building



3. Parent(s) should be notified to:

- Alert them of the infraction
- Get parental perspective on solutions (parent voice)
- Share the outcome of the restorative intervention
- To encourage at home support for the identified classroom expectation
- To discuss, if necessary, the need for additional supports for the student (ex: social worker, S-Team, 504 Team, restorative assistant, counselor, psychologist or cluster support team)
- Additional supports may also be needed to support the classroom environment and/or teacher

4. Interventions will be documented in S & I.

Level B: Administrative Referral

1. Administrator will hear the student's side of the story and provide an opportunity to write a statement.
2. The administrator will provide the student an opportunity to right the wrong and repair the harm.
3. A formal plan will be created to support the students' needs through providing interventions and support. Staff determines whether to involve a school social worker, nurse, school guidance counselor, psychologist, behavioral analyst, S-Team, 504 Team, IEP Team, or cluster support team.
4. If school-based resources are unable to address the student's needs, a Collaborative Referral is created.
5. All interventions should be documented in the Student Management System (Infinite Campus) and provided to the parent or guardian.
6. If necessary, the administrator will have a conversation with the parent or guardian to discuss the student's needs and how to best support the student.
7. If necessary, in-school suspension (ISS) of up to two days or comparable services may be utilized for middle and high school students. One (1) day of ISS may be used for elementary students. ISS does not take the place of Collaborative Referral.

Level C: Suspension Option

1. Steps one through five are repeated from Level B.
2. If necessary, administrator may:
 - Give middle school and high school students ISS or comparable services for one to three days OR one to three days of Out-of-School Suspensions (OSS), not to exceed a total of three days.
 - Give elementary students one to two days of ISS OR, after obtaining supervisory approval, one to two days of OSS, not to exceed a total of two days.

A formal restorative conference must occur upon return from suspension with all necessary parties including RPA's and Advocacy Center Coaches to establish or modify the student's Plan of Support. Restorative conferences/re-entry meetings must be documented in Support & Intervention (S&I). Parents/guardians, student, teacher(s), relevant support staff and community support must be invited.

Level D: Suspension Option

1. Same as Level C, except that administrator may:

- For elementary students, give one to two days of ISS and/or one to two days of OSS if the offense is eligible for OSS. The combination of ISS and OSS may not exceed a total of two days.
- For middle and high school students, give ISS or comparable services for one to three days and/or OSS for one to five days if necessary. The combination of ISS and OSS may not exceed a total of five days for middle and high school students.
 - **Code 414 ONLY** - Group Fight violations, up to a 10 day suspension option may be used in lieu of expulsion for middle and high.

2. When choosing a higher-level response within the range of possible responses, an administrator must consider:

- The student's age, health, disability, decision-making ability and prior intervention history.
- The student's willingness to repair the harm.
- The seriousness of the act.
- The harm caused or the potential to cause harm, including any injuries caused.
- The extent of actual disruption to the learning environment.

3. Upon return from suspension, a restorative conference must occur and a collaborative referral must be made. A plan of support for the student must be created.

Level E: Expulsion Option

1. Same as level D, except that administrator may expel a middle or high school student if necessary. *Elementary students may not be expelled, except for Type 5 Behaviors.*
2. Expulsion Documentation: All interventions utilized prior to expulsion must be clearly documented in the Student Management System (Infinite Campus). All reasons for expelling a student rather than using a lower level of response must be clearly detailed.
3. Upon return from expulsion, a formal restorative conference must be held with appropriate individuals including parent/guardian, student, teacher(s), relevant support staff and community supports.

Expulsion is a measure of last resort. Prior to expulsion, all of the following factors *must* be considered:

- the student's age, health, disability, decision-making ability and prior intervention history
- the student's willingness to repair the harm
- the seriousness of the act
- the harm caused or the potential to cause harm, including any injuries caused
- the extent of actual disruption to the learning environment
- whether the act was intentional.

Zero Tolerance Offenses as defined by state law require a level E response. All Zero Tolerance offenses require a mandatory expulsion of 180 school days.

Level T: Transportation Suspension Option

For certain behaviors occurring on the bus affecting student safety, a student may be suspended from the bus for a maximum of three days. The T response may only be used for behavior occurring on the bus. When a student is suspended from the bus, they may still attend school but parents are responsible for transportation. Recognizing that some students do not have alternate transportation when suspended from the bus, a bus suspension will only be used if the bus driver has not been able to address the student's behavior by reminding the student about behavioral expectations on the bus, having a restorative conversation with the student, changing the student's assigned seat, and calling a parent/guardian to address

the concern. The bus driver will utilize restorative approaches to behavior when the bus is in a safe and secure location, prior to initiating a referral to school administration. The driver's discipline referral to the school will include interventions tried prior to referral.



LEAD Public Schools 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 2022 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 30, 2023. In order to provide timely enrollment estimates to the Department of Education, the enrollment period and lottery will conclude by March 15, 2023.

Application Platform- We are currently in the final stages of reviewing both SchoolMint and SmartChoice as platforms for our application. Our organization and Director of School Enrollment have prior experience with SchoolMint, and Smart Choice is being currently utilized with our network of campuses. Both systems integrate with Powerschool. We will make a final decision upon learning more about the compliance requirements of the TN Charter Commission.

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 30, 2023 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 Neely's Bend community which are English and Spanish. If we receive more applications than the planned capacity, LEAD Neely's Bend will conduct a lottery in accordance with Tennessee Code Annotated (T.C.A.) §49-13-113.

Proposed Open Enrollment/Lottery Calendar

- **Monday, December 5 - Friday, December 16, 2022 - Re-Enrollment Process**
 - All current LEAD Neely's Bend families will have the opportunity to re-enroll with LEAD Neely's Bend via our re-enrollment process. This process will be executed collaboratively with our Operations Team, and will be done utilizing Possip, Deanslist, our closed Facebook Groups, phone call outreach, and a paper process consistent with our past processes.
- **January 27, 2023 - The TN Charter Commission approves or denies LEAD Neely's Bend Application.**
- **Friday, February 17, 2023: LEAD Neely's Bend Open Enrollment Application Launch**

- This application will include all families interested in enrolling in LEAD Neely's Bend across Davidson County and also within our predefined enrollment zones for LEAD Neely's Bend.
- **Friday, February 24, 2023: Open Enrollment Application Deadline (by 4:30 p.m.)** *Parents return forms to the Front Office at LEAD Neely's Bend 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, February 10, 2023 will be placed at the end of the waitlist.
- **Monday, March 6, 2023:** Open Enrollment Lottery Day Results Available.
- **Wednesday, March 8, 2023:** Open Enrollment Acceptance/Waitlist Letters Acceptance and waitlist letters will be communicated to parents on this date.
- **Friday, March 24, 2023:** Deadline to Return Open Enrollment/Lottery Acceptance Letters (by 4:30 p.m.) **The acceptance letter must be returned to the LEAD Neely's Bend 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 12, 2023:** 2023-2024 Student Placement Verification will be communicated to families.

***Available Seats** - Families may apply year-round to LEAD Neely's Bend through our Open Enrollment process and placement will be granted based on placement on the waitlist and enrollment capacity.

Enrollment Procedures

LEAD Neely's Bend 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 Neely's Bend 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 Neely's Bend being authorized by the Tennessee 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 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 Neely's Bend 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 Neely's Bend 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 Neely's Bend 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 Neely's Bend 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 Neely’s Bend 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-Enrollment Process at LEAD Public Schools (Returning LEAD Families)**
 - Intent to return forms are 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 31st. Families are given one week to complete the form and return it to the Family 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.
 - **Continuation Form 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 Neely's Bend if authorized through the TN Charter Commission. This form is available upon request.
 - **Census Verification Form Process** - As a part of our re-enrollment 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 Neely's Bend 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 Neely's Bend 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.



November 9, 2022

Tennessee Public Charter School Commission
Tess Stovall, Executive Director
500 James Robertson Parkway
5th Floor, Davy Crockett Tower
Nashville, Tennessee 37243

Dear Executive Director Stovall,

I am writing today to express the support of the Tennessee Charter School Center for the reauthorization of LEAD Neely's Bend by the Tennessee Public Charter School Commission. As the state's primary public charter school support organization, our team has worked closely with leadership at LEAD Public Schools for many years, and we respect the work done network-wide, and certainly at Neely's Bend, where the LEAD team brought the school from a Level 1 TVAAS school to a Level 5, and that Level 5 growth has remained consistent since 2017.

In 2015, LEAD Public Schools answered the call from the Achievement School District to shepherd the work at Neely's Bend along pathways of growth to ensure that this school could become a high quality public school option for Nashville students. LEAD Public Schools has demonstrated excellence in academic progress and especially in college going rates for students at schools across Nashville, and Neely's Bend is a part of this network-wide success. Clearly the LEAD team at Neely's Bend has focused on academic growth, but they have also focused on ensuring students feel they are part of an exciting school community, with broad opportunities for the joy of learning, particularly through an exceptional music program.

We all know the hard work and dedication required of educators and school leaders to work alongside students and families to take a school out of the bottom five percent. Our team was thrilled to see the work of LEAD Public Schools pay off at Neely's Bend as this school exited the priority list in 2022. It is so exciting to recommend them for reauthorization by the Tennessee Public Charter School Commission as the school enters a new era of growth and success.

Sincerely,

A handwritten signature in black ink, appearing to read 'Maya Bugg', written in a cursive style.

Dr. Maya M. Bugg, President and CEO
Tennessee Charter School Center

Letter of Support
11/4/2022

To Whom it May Concern:

My daughter attends Lead Neely's Bend and is currently in the 7th grade. My daughter is actually zoned for another MNPS school. I was very happy to happy the option for her to attend a charter school. Lead has always been on top of the academic structure within the school. Lead has helped my daughter become more of a diverse student. She has learned so much from Lead. All staff have been informative and you can tell that the teachers love teaching the students that they serve. My daughter is zoned to go to Hunters Lane High School for 9th grade and I refuse to let her go there. I want her to learn at Lead Academy when that time comes.

My daughter is a cheerleader at Lead and while being separated from MNPS sports activities/games this past summer, Lead quickly came to a solution to help our kids continue to enjoy sports.

Grayline provides the transportation for our kids to and from school. This year my daughter bus stop is way closer to our home than the last few years. All bus drivers are amazing and I appreciate them.

Myself and my daughter are extremely grateful for Lead Nelly's Bend school, staff, and the academic levels that they are accomplishing. Education is key with the world we live in today. Without outstanding leadership, structure, and education, our children, my child, would be lost.

Sincerely,

Stephaine Solomon

615-815-9927

Moniqueca Suggs
212 Chesterton Ct.
Madison, TN, 37115

To whom it may concern:

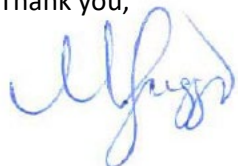
When my family and I moved into this neighborhood 5+ years ago, we were not thrilled about the school options. Upon further research, we discovered most of the reviews and expressed concerns were prior to LEAD taking over the school. We decided to give LEAD Neely's Bend a one-year trial run with our then incoming 5th grader. We are happy we did. They surpassed our expectations and have shown to be a great community advocate as well.

We love their approach to the individual student. Too many schools lump all kids into one bubble. We saw this happening at our kid's prior school. Those students who fall below, get left behind and end up not having the tools to succeed in the next school year. With LEAD's focus on the individual, we saw our son excel in ways he hadn't before. When there were areas of focus or lacking, these things were communicated with us, and a plan established on how we could help him as well. We loved this!

We also love their community engagement. They hold several events inviting everyone out to the school, they help families/people in need with food and support, and they really seem to build on these ideas every year and refocus where needed to make the biggest impact.

Our family fully supports this school. So much so that our son stayed there his entire middle school years, and we have another student there with one more headed there next year. We hope LEAD Neely's Bend growth continues, and they can continue their community commitment /engagement for years to come.

Thank you,



11-03-2022

LEAD NEELY'S BEND (BLANCA CROSS)

- NANCY GARCIA M

YO EN LO PERSONAL ME GUSTA COMO
TODO EL PERSONAL DE LA ESCUELA
TRATAN BIEN A LOS ALUMNOS Y PERSONAL
CUANDO SE TRATA DE DAR INFORMACION PARA
COMO IR BIEN EN LA ESCUELA Y MEJORAR
COMPLEMENTOS PARA QUE ESTE MEJOR
MIS HIJAS HAN ESTADO EN ESTA ESCUELA
Y LE GUSTA MUCHO SUS MAESTROS Y TODO
EL PERSONAL DE LA ESCUELA

ATT = Nancy García M

To Whom it May Concern:

I am writing today on behalf of Lead Neely's Bend (LNB), where my son is a student in Eighth Grade. My wife and I are impressed with the way that LNB is able to engage our son and to help maximize his learning potential. The academic programs at LNB are very impressive and I wish that I had had the academic opportunities at my son's age as he and his peers have now.

Additionally, his teachers, the administration, and staff are always very engaging. Despite being responsible for so many students, they know who my son is as well as our family and seem to care about us all on a personal level. This level of engagement is part of what helps make the academic programs excel. I always know the expectations for my son and can access his goals and progress at any time. Our son's time at LNB has helped to prepare him for his next stage of development, and we are especially grateful to the school for their partnership in our son's education.

Sincerely,

A handwritten signature in blue ink, appearing to read "Brandon Gilbert", is placed over a light blue rectangular background.

Brandon Gilbert

November 10, 2022

To Whom it May Concern:

My name is Ramona Johnson and I am a current parent to Randy & Zaccary Johnson who is a student at LEAD Neely's Bend. As a family of LEAD Neely's Bend, I have had the opportunity to experience the school firsthand and have benefitted from the daily partnership from faculty & staff as a parent. There are numerous resources & levels of communication provided to us daily and weekly.

We are not out of the loop regarding the academic and community relations that are being rendered to our students and family by LEAD Neely's Bend.

My family is very proud to witness the milestone that has been accomplished by LEAD Neely's Bend regarding the successful exit from the Priority List. We are proud that our sons are benefitting from the hard work and efforts given by the administrators, teachers, staff & volunteers.

It is my understanding that as a part of the school's successful exit from the Priority List, that we are seeking alternative means for authorization and the TN Charter Commission is an option. I am writing this letter in support of LEAD Neely's Bend continuing to be operated by LEAD Public Schools and also as a value add to the Madison community. It is my hope that Neely's Bend can continue to provide a similar opportunity that my family has had to more students and families for years to come.

Please feel free to contact me directly if you have any follow up questions. I truly value LEAD Neely's Bend and hope that it can continue to operate and be a positive presence in the Neely's Bend and greater Madison community.

Neely's Bend Parent,

Ramona L Johnson

615-397-6642

November 14, 2022

Misty Stevenson
606 N Dupont Ave
Apt 101
Madison, Tn 37115
615-977-3860
Mstevenson0707@gmail.com

My name is Misty Stevenson, and I am a current parent to Jamison and Jamiya Brooks who are students at LEAD Neely's Bend. As a family of LEAD Neely's Bend, I have had the opportunity to experience the school firsthand and have benefitted from being a part of the LNB family. Transitioning to a new school during a pandemic, LNB set the bar high as far as expectations from the beginning. When the world was confused and had no idea of what they would do during the pandemic; LNB had a vision, and it was clear to the families and students. The vision has always been to make sure our children excel academically but as a whole person too. The support LNB offers the students, and their families has been unmatched! Never have I felt left out or unknown- the communication and community engagement is excellent! Being a part of the parent committee also has given me the opportunity to see more of the hard work and dedication LNB has for its community!

It is my understanding that as a part of the school's successful exit from the Priority List, that we are seeking alternative means for authorization and the TN Charter Commission is an option. I am writing this letter in support of LEAD Neely's Bend continuing to be operated by LEAD Public Schools and as a value add to the Madison community. It is my hope that Neely's Bend can continue to provide a similar opportunity that my family has had to more students and families for years to come.

Please feel free to contact me directly if you have any follow up questions. I truly value LEAD Neely's Bend and hope that it can continue to operate and be a positive presence in the Neely's Bend and greater Madison community.

Best Wishes,

Misty Stevenson

John Cooper, MAYOR



METROPOLITAN BOARD OF PARKS AND RECREATION

Centennial Park Office
Park Plaza at Oman Street
Nashville, TN 37201

(615) 862-8400
Fax (615) 862-8414
www.nashville.gov/parks
Monique N. Odom, Director

Madison Regional Community Center 550 N Dupont Ave, TN 37115

To Whom It May Concern:

My name is Anita Gregory-Smith, and I am the Facility Coordinator here for The Madison Regional Community Center, our organization collaborate with Neely's Bend for the last 2 years now. I have had the opportunity to experience the willingness of the staff when it comes to program and activity we do here at the center. I have benefitted their willingness to volunteer and help at several events that we have had throughout the year.

It is my understanding that as a part of the school's successful exit from the priority list, that we are seeking alternative mean for authorization and the TN Charter Commission is an option. I am writing this letter in support of Lead Neely's Bend continuing to be operated by Lead Public Schools and as a value add to the Madison Regional Center. It is my hope that Neely's Bend can continue to provide a similar opportunity that our families here at the community center has had to more students and families for years to come.

Please feel free to contact me directly if you have any follow up question, I truly value Lead Neely's Bend and hope that if can continue to operate and be a positive presence in the Neely's Bend and greater Madison Community Center.

Best regards,

Anita Gregory-Smith
Madison Regional Center
615-862-8459

To Whom it May Concern

My name is April Amos and I am a current parent to Maliki Amos who is a student at LEAD Neely's Bend. As a family of LEAD Neely's Bend, I have had the opportunity to experience the school firsthand and have benefitted from this school.

My son was at a different charter school last year and it was horrible for him. He has done so much better at LEAD, personally, academically and mentally. He's receiving the support he needs this year. From a parents standpoint I couldn't ever get any to answer a phone call last year at my previous school. Not at LEAD if I need someone there's always someone there to answer and help. It's nice to finally be back in a school that treats everyone like family.

It is my understanding that as a part of the school's successful exit from the Priority List, that we are seeking alternative means for authorization and the TN Charter Commission is an option. I am writing this letter in support of LEAD Neely's Bend continuing to be operated by LEAD Public Schools and also as a value add to the Madison community. It is my hope that Neely's Bend can continue to provide a similar opportunity that my family has had to more students and families for years to come.

Please feel free to contact me directly if you have any follow up questions. I truly value LEAD Neely's Bend and hope that it can continue to operate and be a positive presence in the Neely's Bend and greater Madison community.

Sincerely,
April Amos

Parent Support Letter

November 11, 2022

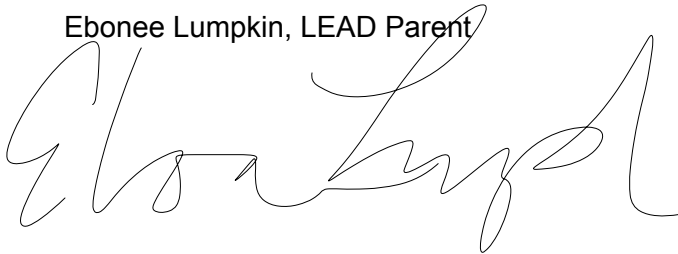
As a parent of Neely's Bend LEAD, I support the school's efforts to take the next step on their journey to providing the best education for youth in the Madison area. I am proud of my child's progress as well as his excitement about attending school every day.

Some of the procedures in place that I believe contribute to his positive attitude and academic performance are the school's incentive programs and opportunity for academic and social development in the CASE after school program.

Neely's Bend LEAD also does a fantastic job communicating consistently with regard to schedules, homework, and special events in a weekly newsletter. In addition, text reminders from teachers are helpful for me to stay engaged with my child and their school work. I feel like I am able to support my child at home and I feel like he has the support he needs at school.

Some of the questions I had about the transition were about the enrollment process from the local elementary school into Neely's Bend LEAD. Those questions were answered during the parent meeting.

Ebonee Lumpkin, LEAD Parent

A handwritten signature in black ink, appearing to read 'Ebonee Lumpkin', written in a cursive style.

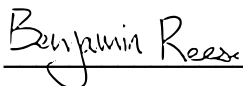
To whom it may concern,

As the program director of the CASE after-school program, I've gotten the great privilege of working with the faculty and administration at LEAD Neely's Bend for the last several years. During this time, I've gotten the opportunity to see first-hand their care and dedication for their students.

At the CASE program, we provide free after-school services to students, offering academic help, character lessons, and enhancement activities. As an outside organization, we rely on the cooperation and help of the school to provide these services. They have been gracious and helpful in providing us space, support, and encouragement. They understand the importance of offering their students a range of services to help their student holistically develop.

The primary observation that I've made in my time of working with LEAD Neely's Bend is their attention to the individual needs of the student. When an issue or concern has arisen in our program, the staff has been quick to provide counselors and support. I've seen how the staff interacts and cares for individual students; the ways in which they know and support their families; and the way they coordinate services to support and respond to their student body. All of this is reflected in how the students talk about their staff and school.

It's clear to me that the staff at LEAD Neely's Bend cares deeply about their students and their community. I believe they are an exemplary school that offers quality education in a safe and caring environment.



Benjamin Reese
Program Director

**ARTICLES OF ORGANIZATION
OF
NEELY'S BEND COLLEGE PREP, NONPROFIT LLC
A TENNESSEE NONPROFIT LIMITED LIABILITY COMPANY**

Pursuant to the provisions of Tennessee Code Annotated § 48-101-801 et. seq., relating to the Tennessee Revised Nonprofit Limited Liability Company Act, the sole nonprofit member of Neely's Bend College Prep, Nonprofit LLC hereby adopts the following Articles of Organization:

Article I. Name

The name of the nonprofit limited liability company is Neely's Bend College Prep, Nonprofit LLC (the "Company").

Article II. Registered Office and Agent

The street address of the registered office of the Company shall be 531 Metroplex Dr, Suite 200-A, Nashville, Tennessee 37211. The name of the registered agent at that office shall be Chris Reynolds.

Article III. Organizer

The name and address of the organizer of the Company is Christopher C. Whitson, Sherrard & Roe, PLC, 150 Third Avenue South, Nashville, Tennessee 37201.

Article IV. Purpose

The Company is organized exclusively for charitable and educational purposes. Specifically, the Company shall establish and operate a Charter School 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") and the Tennessee Achievement School District. The Company is organized to engage in any activity, and to exercise any and all powers, rights and privileges, afforded a nonprofit limited liability company under the Tennessee Revised Nonprofit Company Act, as amended from time to time (the "Act"). The Company may engage in all activities proper under applicable law, provided such activities are not inconsistent with the Act, the Charter Act, the requirements of the Metro School Board, the requirements of the Tennessee Achievement School District, or the Company's Operating Agreement.

The Company is organized to engage in any activity, and to exercise any and all powers, rights and privileges, afforded a nonprofit limited liability company under the Act; provided, however, that the Company shall not carry on any other activities not permitted to be carried on by a nonprofit limited liability company organized under the laws of the State of Tennessee pursuant to the Act or the Charter Act.

Article V. Member Managed

The Company shall be managed by its sole Member, LEAD Public Schools, Inc., in accordance with Tennessee Code Annotated §48-249-401(a), and by an Advisory Board and such officers, as shall be described in the Operating Agreement of the Company. The Operating Agreement of the Company shall be adopted by the sole Member of the Company.

Article VI. Sole Member

The sole member of the Company is LEAD Public Schools, Inc., 531 Metroplex Dr, Suite 200-A, Nashville, Tennessee 37211. As required by Tennessee Code Annotated § 48-101-805, there is one member at the date of the filing of these Articles, which is a nonprofit corporation within the meaning of Tenn. Code Ann. § 48-101-802(2). As provided in Tennessee Code Annotated § 48-101-805, the Company shall not have more than one member at any time and that member shall be a nonprofit corporation within the meaning of Tennessee Code Annotated § 48-101-802(2).

Article VII. Principal Executive Office

The address of the principal executive office of the Company shall be 531 Metroplex Dr, Suite 200-A, Nashville, Tennessee 37211.

Article VIII. No Private Inurement

No part of the net earnings of the Company shall inure to the benefit of, or be distributable to, its officers, Directors, or other private persons. However, the Company shall be authorized and empowered to pay reasonable compensation for services rendered to it or on its behalf, pay reimbursements for expenses incurred on its behalf, and make payments and distributions in furtherance of the charitable and educational purposes, and other purposes set forth in the Company's Articles of Organization and/or Operating Agreement, as amended from time to time.

Article IX. No Legislative or Political Activity

No substantial part of the activities of the Company shall be the carrying on of propaganda, or otherwise attempting to influence legislation; and the Company shall not participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office.

Article X. Indemnification and Advancement of Expenses

1. Mandatory Indemnification of Directors and Officers. To the maximum extent permitted by the provisions of Section 48-101-806(b) of the Act and Tennessee Code Annotated Section 48-249-115, 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 paragraph 1 which occur subsequent to the effective date of such amendment), the Company shall indemnify and advance expenses to any person who is or was a director or officer of the Company, 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:

(a) The Proceeding was instituted by reason of the fact that such person is or was a director or officer of the Company; and

(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 Company, 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 Company; 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 Company. 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. Permissive Indemnification of Employees and Agents. The Company may, to the maximum extent permitted by the provisions of Section 48-101-806(b) 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 paragraph 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 Company, or to such person's heirs, executors, administrators, or legal representatives, to the same extent as set forth in paragraph 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 Company and met the standards of conduct set forth in subparagraph 1(b) above. The Company may also indemnify and advance expenses in a Proceeding to any person who is or was an employee or agent of the Company 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. Non-Exclusive Application. The rights to indemnification and advancement of expenses set forth in paragraphs 1 and 2 above are contractual between the Company 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 these Articles of Organization, by a resolution of the Board of Directors, by the Operating Agreement of the Company, by the purchase and maintenance by the Company of insurance on behalf of a director, officer,

employee or agent of the Company, or by an agreement with the Company 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, company, partnership or trust which was a predecessor to this Company, and to any officer, director, employee or agent of this Company (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 Company.

4. Non-Limiting Application. The provisions of this Article X shall not limit the power of the Company to pay or reimburse expenses incurred by a director, officer, employee or agent of the Company 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. Prohibited Indemnification. Notwithstanding any other provision of this Article X, the Company shall not indemnify or advance expenses to or on behalf of any director, officer, employee or agent of the Company, or any such person's heirs, executors or administrators:

(a) In connection with a Proceeding by or in the right of the Company in which such person was adjudged liable to the Company; or

(b) 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. 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. Limited Personal Liability of Directors

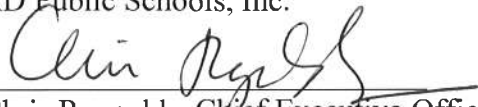
To the maximum extent permitted by the provisions of Section 48-101-806(c) of the Act, no person who is or was a director or officer of the Company, nor such person's heirs, executors, administrators, or legal representatives (collectively referred to as a "director or officer"), shall be personally liable to the Company for monetary damages for breach of fiduciary duty as a director or officer. However, this provision shall not eliminate or limit the liability of a director or officer (a) for any breach of a director's duty of loyalty to the Company, or (b) for acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law. No repeal or modification of the provisions of this Article, either directly or by the adoption of provisions 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 XII. Dissolution

Upon the dissolution of the Company, after paying or making provision for the payment of all liabilities of the Company then outstanding and unpaid, the Board of Directors shall distribute the assets of the Company to LEAD Public Schools, Inc. Any assets not distributed to LEAD Public Schools, Inc., for any reason, shall be distributed to one or more organizations which qualify as exempt organizations under Section 501(c)(3) of the Code for exclusively public purposes and whose purpose is similar to those of the Company. Any assets not so disposed of by the Board of Directors shall be disposed of by a court having equity jurisdiction in the county in which the principal office of the Company is then located, with the distribution of assets to be made to such organization or organizations which are organized and operated exclusively for such purposes, as such court shall determine.

IN WITNESS WHEREOF, the undersigned has executed these Articles of Organization on this 9th day of April 2015.

LEAD Public Schools, Inc.

By 
Chris Reynolds, Chief Executive Officer



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

Filing Information

Name: **LEAD Public Schools, Inc.**

General Information

Control # : 488781 Formation Locale: Davidson County
Filing Type: Corporation Non-Profit - Domestic Date Formed: 03/03/2004
Filing Date: 03/03/2004 9:28 AM Fiscal Year Close 12
Status: Active
Duration Term: Perpetual
Public/Mutual Benefit: Public

Registered Agent Address

JEREMY D KANE
 1704 HEIMAN AVE
 NASHVILLE, TN 37208

Principal Address

1704 HEIMAN AVE
 NASHVILLE, TN 37208

The following document(s) was/were filed in this office on the date(s) indicated below:

<u>Date Filed</u>	<u>Filing Description</u>	<u>Image #</u>
06/29/2010	Amended and Restated Formation Documents Filing Name Changed From: LEAD ACADEMY To: LEAD Public Schools, Inc.	6739-0748
04/08/2010	2009 Annual Report	6704-0206
09/11/2009	Restated Formation Documents	6594-1561
02/05/2009	2008 Annual Report	6440-1162
05/02/2008	2007 Annual Report Principal Address Changed Registered Agent Physical Address Changed	6309-1321
04/08/2008	Administrative Amendment Mail Address Changed	6284-2594
04/04/2007	2006 Annual Report	6029-1403
08/02/2006	Articles of Amendment Name Changed	5840-0059
05/09/2006	2005 Annual Report	5786-1727
03/03/2004	Initial Filing	5376-2208

Active Assumed Names (if any)

Date **Expires**

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 24 2007

LEAD ACADEMY
C/O JEREMY D KANE
5202 IDAHO AVE
NASHVILLE, TN 37209-3307

Employer Identification Number:
20-2526508
DLN:
406289069
Contact Person:
JOYCE DARBY ID# 95011
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(ii)
Form 990 Required:
Yes
Effective Date of Exemption:
March 3, 2005
Contribution Deductibility:
Yes

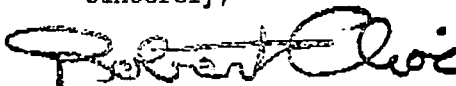
Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Robert Choi
Director, Exempt Organizations
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)

Letter 947 (DO/CG)



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.

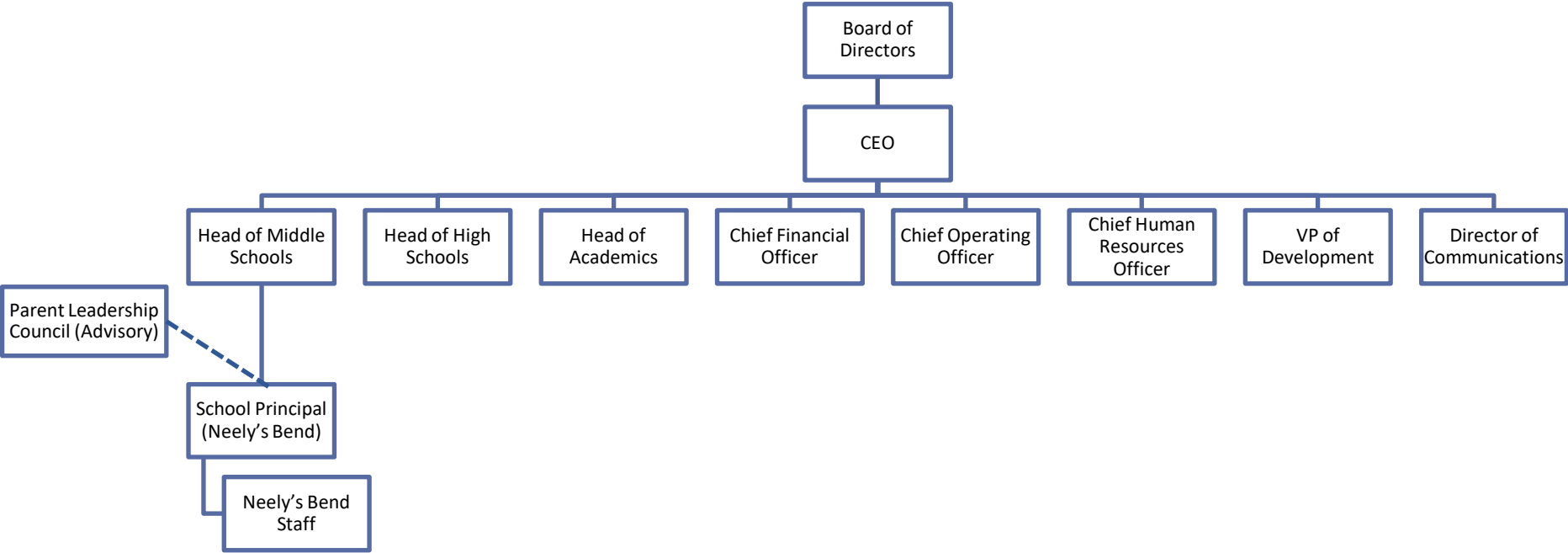
(2) If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board or Committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

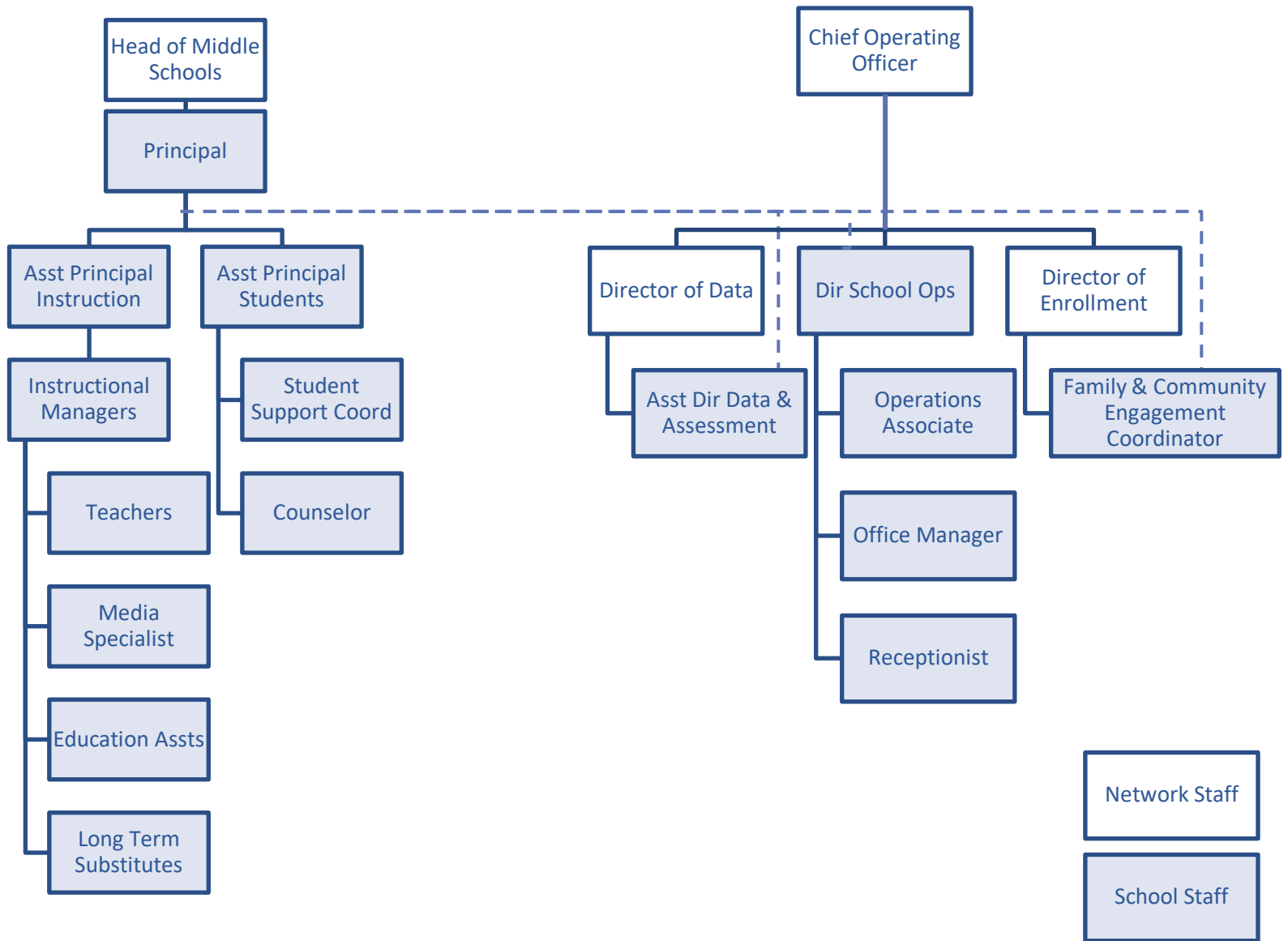
ARTICLE XII.

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







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.

Staff members are expected to make themselves available to fellow staff members, 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 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 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

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 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 supervisor.

All positions are classified into the following categories:

Position Classification	Employee Groups
Certified	Positions requiring a teaching certificate: <ul style="list-style-type: none">• Teachers

Support	Positions not requiring a teaching certificate, such as: <ul style="list-style-type: none"> ● Principals ● Assistant Principals ● Counselors ● Education Assistants ● Operations Managers ● Office Managers and Office Staff ● Nest Staff
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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 package (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	Definition
School Year	<ul style="list-style-type: none"> ● Teacher ● Student Support Coordinator ● Education Assistant ● Counselor 	Employees who only work during the school year and are deemed School Year employees

Calendar Year	<ul style="list-style-type: none"> ● Principal ● Assistant Principal ● Instructional Manager ● Office Manager & Office Assistant ● Director of Operations ● NeST Staff 	Employees who work the full calendar year and are deemed Calendar Year employees
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Certification

Employment for teachers is contingent on completion of certification in Tennessee. LEAD Public Schools reserves the right to adjust employee classification, as well as the resulting salary, and/or terminate a staff member should a teacher fail to be licensed in the area in which they were originally hired to teach.

All positions serving as a teacher of record in any course will be classified as Certificated. In addition, the State of TN classifies as Certificated any employee who has participated in the TCRS pension plan and has not requested a refund of contributions. Therefore, LPS will classify as Certificated any staff member who has participated in TCRS and not requested a refund of contributions.

GENERAL INFORMATION AND PRACTICES

Hours

Hours are set by Principals. Employees are encouraged to discuss work hours with their supervisor 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. During times when school is canceled, staff should check email communication for further information. If an employee is unable to make it to work, they are expected to inform their immediate supervisor as early as possible that they will be absent. If an employee fails to come to work when school has not been canceled, the employee must use any available accrued leave.

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 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 MDHR. 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 Chief Human Resource Officer. 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

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. 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 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 HR team at (615) 622-1845 or by email at hradp@leadpublicschools.org.

Employment Verification/References

We have partnered with The Work Number to provide employment verifications. All employment verifications should be submitted:

www.theworknumber.com

Provide Company Code: 119585

Provide Your Social Security Number

Occasionally, current or former employees may need LEAD to verify their employment, address, position, salary, or other information. All requests for such information regarding current or former employees must be directed to hradp@leadpublicschools.org. 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 Supervisor 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

- o 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

In the event a charge of inappropriate behavior is made, all allegations shall be carefully and thoughtfully investigated internally and reported to the appropriate Human Resources personnel and, if the alleged activity may also be illegal, to the appropriate local, state or federal authority. LEAD employees are required by this policy to immediately report to the Principal or to a person designated by the facility director, 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. The Principal, or designee, is required to ensure filing of appropriate state reports if applicable.

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 violation of LEAD's Employee Conduct and Progressive Disciplinary Action Including Termination Policy/Code of Conduct Policy and may subject the employee to discipline, up to and including discharge 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 by anyone at LPS (including supervisors, co-workers or visitors) must bring the problem to the attention of their Principal or Chief Human Resource Officer. Retaliation against an employee for bringing a complaint is prohibited. Violation of this prohibition against retaliation may result in discipline up to and including discharge.

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 require staff to notify their supervisor and Chief Human Resource Officer if they are in a romantic relationship with another staff person. 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 members of 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 members 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 member may have to resign or be demoted to remove the conflict of interest. LEAD Public Schools will first ask the members to choose which member 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.

Members 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 members 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 of employment. All planned absences must be approved by the Principal or Supervisor at least ten (10) days in advance. For unplanned absences, please contact the Principal or Supervisor 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 employee's supervisor is properly notified if he 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 sick leave
5. Take steps to correct problems which frequently cause excessive absences or tardiness
6. Log into ADP for accrual leave time balance and use.

For information regarding LEAD's blackout days, please see the Holiday and Break Policy.

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 staff members 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 staff members and volunteers, professional dress is defined as:

- **All days:** Staff members 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 supervisor 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.

Staff members who are not confident their attire meets the LEAD dress code should err on the side of modesty and ask their supervisor 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 supervisor. The Head of Schools and Chief Human Resource Officer will review requests for approval. Dress code infractions will be handled on an individual basis by the Head of Schools and Chief Human Resource Officer 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 The Company 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 the Company 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 staff members 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. 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 Sr. HR Executive or HR Business Partner, 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 discipline up to and including termination of employment. 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. Staff members 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. Staff members also agree not to download any illegal software onto their computer or tablet. All LEAD issued technology must be returned prior to a staff member'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 supervisor 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 Communication. 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:

- Staff members should not invite or accept students to be members of their immediate social group on social media sites (for example, staff should not “friend” their students on Facebook).
- While staff members 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, staff members may not identify any students or their family members by name. Staff members 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).
- Staff members 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 staff may not endorse a candidate or support a political campaign on behalf of our school system or any of our campuses.
- **Social Media:** Staff 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 staff as an individual, not as a LEAD Public Schools staff person. Any social media activity in support of a candidate must be made from a staff member's personal account, not school accounts.
- **Volunteering:** Staff 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 staff may not wear school branded attire.
- **Marketing or Information Sharing:** Any information that staff share on behalf of any political candidate should not be done so using LEAD school email account, media sites, webpages, or on school property. Staff 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 staff members with all the resources they need to be successful in the classroom. Should a staff member have additional needs, we encourage them to speak with their Principal. Any fundraising activities must be approved by a school supervisor in collaboration with our Director of Development. Staff members 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 Principal, supervisor, CEO or Chief Human Resource Officer.

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. Anonymous reports will be accepted, and all reports will be handled on a confidential basis. The contact information for the Board chair is below. Mark envelope: "TO BE OPENED BY ADDRESSEE ONLY PERSONAL AND CONFIDENTIAL". 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 suggestions, concerns or grievances either about the operations of LPS in general or about their own individual situations. LPS believes strongly that these matters should be aired and resolved in an orderly fashion, rather than be ignored. If your suggestion or concern applies to multiple departments across the organization, please bring the issue to the attention of your Principal. If your concern applies to a single or small group of individuals, LPS requests that issues be handled in the following way:

- 1) The concerned employee should first raise the matter, on an informal basis, with the co-worker involved. If for any reason the employee is uncomfortable in raising the matter with his/her supervisor, s/he should discuss it informally either with another supervisor or with the Principal. If the matter concerns the Principal, contact should be made directly with the Head of Schools or Chief Human Resource Officer.
- 2) If the concern persists after a reasonable attempt to resolve it informally, the employee should set out in writing to the employee's supervisor a description of the problem and the employee's proposed solution.
- 3) If the matter is not resolved within 14 days after being submitted to the employee's supervisor, the employee should submit the problem and proposed solution in writing to the CEO or Chief Human Resource Officer.
- 4) If the employee is not satisfied after the problem has been presented to the CEO or Chief Human Resource Officer, the employee may submit the matter in writing to the President of the Board who will review it with the Board of Directors. The Board of Directors has final authority in such matters and will generally make a determination within 30 days after such matter is submitted to them.

Employee Conduct and Progressive Disciplinary Action Policy (Including Termination Policy)

Working at LPS requires an understanding of our commitment to teamwork on all levels and mutual respect amongst all staff members. 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 supervisor or principal may take corrective disciplinary action regarding infractions by initiating the progressive discipline model including a verbal counseling, a written reprimand, and termination, if necessary. Progressive disciplinary action is taken to correct an infraction and ensure transparency between a supervisor and employee.

Grounds for Disciplinary Action:

The following is not an exhaustive list, but constitutes grounds for disciplinary action:

1. Insubordination toward the supervisor.
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.

Leaving LEAD Public Schools

Under certain circumstances, an employee may choose to leave his or her position at LEAD. An employment separation at the initiative of the employee is considered resignation. To minimize disruption to the organization, employees who decide to resign are urged to give advance notice. Although employment is “at-will”, LEAD requests that all employees give at least two weeks’ notice before leaving her/his position in order to be eligible for rehire.

In addition, Human Resources will schedule an exit interview. During this meeting, the HR Benefits and Payroll Specialist will review benefits, Cobra, exit interview, and schedule the receipt of a final paycheck.

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. In addition, each school maintains its own handbook outlining those procedures which are campus-specific. All Staff should familiarize themselves with both these procedures and those included in their campus handbook.

Transporting Students in Cars

It is the policy of LEAD that teachers not transport students in their own vehicles.

Responding to Fights

If a fight occurs in your classroom, 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 an administrator or another teacher for help. If a fight occurs and you are a witness, you must report the incident by email to your Principal and Dean of Culture 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, it is your legal obligation to report that abuse to the Department of Children's Services (DCS). 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 an administrator for assistance. If you believe the child is in imminent danger, report the abuse immediately to an administrator 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 an administrator who will work with you to contact the appropriate assistance for the student.

School Safety

All employees are expected to promote school safety. Staff members should not prop open doors or distribute access codes or keys to any other individuals. All staff 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, staff members 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 12:00 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.

Direct Deposit

All new hires will be required to enroll in direct deposit during Onboarding in ADP. Also, if existing staff makes changes to their direct deposit information, they must have at least one active direct deposit account in ADP.

Wisely Pay Cards

We have partnered with ADP and are offering Wisely Payroll Cards and direct checks for employees who do not have an active account. New Hires and existing staff may request a card through ADP (Click on Myself- Under Pay Tab - Select Payroll Options) and a temporary card will be provided within two days of their request. [Wisely Pay Cards](#)

Time Keeping

All non-exempt hourly employees are required to maintain time records which reflect actual hours worked, hourly rate, and BOTH the employee and supervisor's signatures. Recording incorrect or false information regarding actual hours worked is considered misconduct and is subject to discipline as provided in this handbook. All timesheets must be submitted by the supervisor to the HR Benefits and Payroll Specialist no later than Monday at 9 am in order to be processed on the following week's pay period. 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 supervisor prior to working 40 hours. Exempt employees, including Teachers and Salaried Support Staff, 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 performance, cost-of-living, 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

For some positions at LPS, it is necessary that employees periodically incur expenses which LPS will reimburse. Employees must submit detailed receipts for all purchases for reimbursement.

LPS strives to serve its students as part of the public good; therefore, it is central to LPS's philosophy that administrative expenses be held to a realistic minimum consistent with getting the job done. Therefore, although employees are expected to spend what is reasonably necessary to accomplish the assigned task, the least expense required to do that is the rule. Travel shall be at the lowest available rates, lodging and meal expenses are to be modest, and similar guidelines are to be followed in other areas.

If an employee uses his/her personal car in connection with LPS travel, mileage will be reimbursed at the IRS rate upon submission of the expense reimbursement form and documentation verifying mileage. Such mileage should not include travel between the employee's home and LPS campuses.

LEAD Public Schools will not use public funds to purchase alcohol and therefore will not reimburse any staff members for alcohol. In addition, because of IRS regulations, LEAD Public schools does not provide gift cards to staff members and thus gift cards for staff will not be reimbursed.

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.

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	
Additional Benefits	Employee Assistance Plan	Guardian	
Retirement		TCRS (Hybrid or Legacy) Pension & 401(k) Plan	LEAD Support 403(b) Plan

Full time staff members are staff members working a minimum of 30 hours per week and are expected to work the entire school year. Full time staff members 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 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 fall for a January 1st effective date.

LEAD Public Schools contributes towards benefits premiums; current rates will be provided annually to all staff members. 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 staff members 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 a staff member 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

Staff members have 30 days from the “Qualifying Status Event” to notify Human Resources to make changes to current coverage. If staff members 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.

RETIREMENT

Certified Staff (Teachers)

All Certificated Staff 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 10.63% 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%	10.63%	Optional	no match	5% or more	10.63%
Hybrid	5%	4%	2% (unless opt out)	5%	7% (opt out: 5%)	9%

Support Staff (Non-teachers & including Hourly employees)

All Non-Teaching Staff, both Salaried and Hourly, 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 staff members 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

Username: Matters

Password: wlm70101

Workers' Compensation

As required by law, LPS provides workers compensation insurance to its employees. If you are injured, notify your Operations Manager and the MDHR that an injury has occurred while you were working at or in the course of your duties within one hour.

You may be contacted by the insurance company for additional information. Failure to notify LPS 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 screen following a workplace accident.

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. 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 leaves employment with a deficient PTO balance, this amount will be withheld from final pay.

All Paid Time Off must be requested through the ADP system. Employees should reach out directly to the HR Benefits and Payroll Specialist with any questions regarding Paid Time Off eligibility or accrual.

Any sick and/or personal time off balances in place as of June 30, 2022 will convert to a time off bank that 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. Rollover balances, as they appear in ADP, will also be placed into this time off bank.

Employees who are sick must notify their supervisor via a voice mail message or telephone conversation prior to 6:30 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 supervisor or HR Department 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 supervisor 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 final payroll in June. This does not include balances that are placed into the time off bank on June 30, 2022. Unused PTO will no longer rollover.

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 staff 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 HR in advance.

Blackout days are defined as days **10-month employees of LPS** are not allowed to take off from work. Any LPS 10-month employee who does not report to work on a blackout day will not be paid for the blackout day. The day before and after a holiday and break are deemed "blackout days" for all **LPS 10-month employees**. In order to receive holiday pay, a 10-month employee must work the day before and after a holiday or break. Additionally, the 10-month employee

must be in a paid status the day before and after a holiday or break to receive holiday pay or pay for the break. For example, a 10-month employee who is recorded with an unexcused absence or leave without pay (LWOP) for any part of the day immediately preceding or following a holiday(s) or break shall lose pay for the holiday or the first day of the break as well as for the other day(s) off. Official holidays occurring during any other paid leave shall not be charged to the employee's other paid leave time (vacation or personal leave).

If an employee is sick either the day before or after a holiday or break, which has been deemed as a "blackout day", then the employee will be required to provide a doctor's statement. Failure to provide a doctor's statement will result in the employee not being paid for the holiday or the first day of the break as well as the day the employee was out.

In order for an **LPS 12-month** employee to use vacation or personal leave before or after a holiday, you must have pre-approval from the immediate supervisor

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

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.

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.

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 comply with LPS normal procedures for requesting leave. 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 Benefits Administration 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 and Memorial 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.
- **Supplemental Pay:** This is benefit pay for parental leave after all accrued time, holidays and breaks that occur during the leave up to the maximum based on whether you are a primary or secondary caregiver.

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.

Emergency Medical Leave Policy

After one year of full-time employment, a full-time employee may take up to 5 paid working days for the hospitalization of a spouse, domestic partner, parent, child, sibling, grandparent, or the parent, child, sibling, or grandparent of the employee's spouse or significant other. Emergency medical leave cannot be taken in addition to maternity or paternity leave. Emergency medical leave time for family not listed above may be granted, under special circumstances, at the discretion of the Chief Human Resource Officer, and shall be paid time off.

Emergency medical leave days may be used one at a time, but may not exceed five days over the course of a fiscal year. Emergency medical leave days may not be carried over into the next fiscal year, nor are employees compensated for unused emergency medical leave days upon termination. If additional time is needed, the employee must request an official leave as outlined in the family and medical leave act.

Jury Duty

If an employee receives a summons for jury duty, the employee should present the summons to his or her supervisor 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 Managing Director of Human Resources and the Head of Schools) 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 principal/supervisor 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.

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 principal/supervisor 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/supervisor, 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 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 the Company 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) the Company 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 the Company 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.

Contact for Questions

Any questions regarding this policy or procedure may be directed to the Human Resources Department at hradp@leadpublicschools.org or (615) 352-1283.

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 Benefits and Payroll 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 Payroll and Benefits 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. 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 Benefits and Payroll 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 supervisor. The appropriate documentation should be attached to the written request and submitted to the Human Resources Department and immediate supervisor (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 Benefits and Payroll 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 re-employment 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 supervisor 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

Voluntary Transfer 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 supervisors. 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 supervisor. 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 not on a Performance Improvement Plan (PIP).
- Employed with LEAD Public Schools for 12 months.
- Provide a valid reason for the transfer request.

Process:

- Speak with your immediate supervisor regarding your request to transfer. At this time, you will discuss a valid reason for the transfer request. Your supervisor can approve or deny the request.
- If approved, discuss with your supervisor which LEAD campus you would like to transfer to.
- Supervisor will notify the talent team that the transfer has been approved.

- Go to leadpublicschools.org 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 supervisor regarding your desire to pursue a job change and whether you meet the eligibility criteria.
- Your supervisor will discuss open positions within the network.
- Supervisor will make the talent team aware of the conversation.
- Go to leadpublicschools.org 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 School's 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.

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 MDHR or HR Benefits and Payroll Specialist 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



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
11/14/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # 1298 Hub International Mid-South 3011 Armory Drive Suite 250 Nashville, TN 37204	CONTACT NAME: Lisa Hess PHONE (A/C, No, Ext): (615) 986-6123 FAX (A/C, No): E-MAIL ADDRESS: lisa.hess@hubinternational.com
INSURER(S) AFFORDING COVERAGE	
INSURED	NAIC #
LEAD Public Schools Inc. 2835 Brick Church Pike Nashville, TN 37207	INSURER A : Cincinnati Insurance Company 10677 INSURER B : Midwest Employers Casualty Company 23612 INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ETD0443416	7/1/2022	7/1/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 2,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			ETD0443416	7/1/2022	7/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			ETD0443416	7/1/2022	7/1/2023	EACH OCCURRENCE \$ 7,000,000 AGGREGATE \$ 7,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below N / A			KEY0146181	7/1/2022	7/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Professional Liab			EME0444516	7/1/2022	7/1/2023	\$5M Occur/\$5M Aggr
A	Sexual Abuse Liab			ETD0443416	7/1/2022	7/1/2023	\$1M Occur/\$2M Aggr

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Subject to all of the terms, conditions, definitions, and exclusions of the above referenced policies as issued by the carriers. Additional Named Insureds:
LEAD Public Schools Inc. Cameron College Prep, Nonprofit LLC LEAD Academy, Nonprofit, LLC LEAD Prep Southeast, Nonprofit LLC LEAD Academy, Nonprofit, LLC dba LEAD High School Brick Church College Prep, Nonprofit, LLC LEAD Real Estate Holdings, LLC Neely's Bend College Prep Nonprofit LLC Cameron College Prep, Nonprofit LLC

CERTIFICATE HOLDER <p style="text-align: center;">For Information Only</p>	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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	2022-2023	24-25	24-25
	Board Approved	Anticipated	Anticipated
	Budget: Neely's	Budget: Neely's	Budget: LEAD
	Bend	Bend	Public Schools
			Network
Enrollment	423	500	2,550
Revenue			
State Revenues	Budget	Budget	Budget
Basic Education Program	\$ 6,406,868	\$ 8,153,995	\$ 41,958,338
BEP Transportation Component	\$ -	\$ -	\$ -
BEP Capital Outlay	\$ -	\$ -	\$ -
Charter School Facilities Funding	\$ -	\$ -	\$ -
Turnaround Action Grant	\$ 267,143	\$ -	\$ -
Federal Revenues			
Title I	\$ 669,713	\$ 229,935	\$ 1,954,900
Title II	\$ 32,674	\$ 34,272	\$ 144,511
Title III	\$ -	\$ 28,493	\$ 28,493
Title IV		\$ 1,930	\$ 1,930
Title V		\$ -	\$ -
NSLP	\$ -	\$ -	\$ -
E-Rate	\$ -	\$ -	\$ -
CSP Startup Grant	\$ -	\$ -	\$ -
IDEA	\$ 158,909	\$ 47,480	\$ 524,434
ESSER	\$ 800,000	\$ -	\$ -
Other	\$ -	\$ -	\$ -
School Activity Revenues			
School Income: Athletics	\$ 4,400	\$ 5,464	\$ 5,464
Student Fees	\$ -	\$ -	\$ -
Fundraising & Philanthropy			
Fundraising Events	\$ -		\$ 500,000
Fundraising- Individual Donations	\$ -		\$ 400,000
Fundraising- Private Grants	\$ -		\$ 300,000
Billboard Revenue	\$ -		\$ 8,000
Total Revenues	\$ 8,339,707	\$ 8,501,569	\$ 45,826,070

EXPENSES

PERSONNEL EXPENSES

School Leadership

	2022-2023		24-25		24-25	
	Board Approved		Anticipated		Anticipated	
	Budget: Neely's		Budget: Neely's		Budget: LEAD	
	Bend		Bend		Public Schools	
					Network	
Enrollment		423		500		2,550
Principal	\$	120,000	\$	128,547	\$	771,282
Asst Principal of Instruction	\$	170,000	\$	182,108	\$	1,001,595
Asst Principal of Students	\$	75,000	\$	80,342	\$	482,051
Dir of School Operations	\$	32,500	\$	69,630	\$	278,519
Total School Leadership	\$	397,500	\$	460,627	\$	2,533,447
Instructional Leadership						
Instructional Manager	\$	260,000	\$	417,778	\$	1,740,741
Instructional Manager: ELL	\$	55,000	\$	58,917	\$	294,587
Assistant Director of Data & Assessment Tech	\$	50,000	\$	53,561	\$	214,245
Total Instructional Leadership	\$	365,000	\$	530,256	\$	2,249,573
Instructional Staff						
Teacher	\$	1,404,000	\$	1,743,539	\$	9,392,614
Reading Interventionist	\$	180,000	\$	192,821	\$	771,282
Media Specialist	\$	52,000	\$	55,704	\$	111,407
Substitute- LT	\$	70,000	\$	74,986	\$	562,393
ExEd instructional Manager	\$	65,000	\$	69,630	\$	557,037
Exceptional Education Teacher	\$	275,000	\$	297,440	\$	1,725,152
ExEd Assistant	\$	120,000	\$	128,547	\$	814,131
Total Instructional Compensation	\$	2,166,000	\$	2,562,666	\$	13,934,017
Student Support Staff						
Counselor	\$	100,000	\$	107,123	\$	749,858
Student Support Coordinator	\$	135,000	\$	144,615	\$	819,487
Total Student Support Staff	\$	235,000	\$	251,738	\$	1,569,345
Operations						
Family Engagement Coordinator	\$	45,000	\$	48,205	\$	289,231
Office Manager	\$	45,000	\$	48,205	\$	289,231
Receptionist	\$	35,000	\$	74,986	\$	149,972
Operations Associate	\$	50,000	\$	53,561	\$	214,245
Total Operations	\$	175,000	\$	224,957	\$	942,678
Administration						
Executive & Head of Schools					\$	477,405
Development & Marketing					\$	286,443
Academic					\$	1,442,824
Finance					\$	477,405

	2022-2023		24-25		24-25	
	Board Approved		Anticipated		Anticipated	
	Budget: Neely's		Budget: Neely's		Budget: LEAD	
	Bend		Bend		Public Schools	
					Network	
Enrollment	423		500		2,550	
Operations & Data					\$	572,886
HR					\$	541,059
Family Engagement					\$	222,789
Total Administration	\$	-	\$	-	\$	4,020,811
Total Employee Salaries	\$	3,338,500	\$	4,030,244	\$	25,249,870
Benefits & Taxes						
Employee- Payroll Tax- SS	\$	206,987	\$	249,875	\$	1,565,492
Employee- Payroll Taxes- Med	\$	48,408	\$	58,439	\$	366,123
Payroll Taxes - Unemployment	\$	5,889	\$	7,110	\$	44,544
Employee- Insurance	\$	250,000	\$	308,700	\$	1,810,305
Ee Benefits - Dental	\$	18,750	\$	23,153	\$	135,773
Ee Benefits - Other Fringe	\$	12,500	\$	15,435	\$	90,515
Employee- Workers Comp	\$	6,677	\$	8,060	\$	50,500
Employee- Retirement TCRS Pension & 401k	\$	229,816	\$	250,882	\$	1,322,816
Employee- Retirement Support 403b	\$	10,063	\$	12,148	\$	189,374
Total Employer Benefits & Taxes	\$	789,090	\$	933,801	\$	5,575,441
Total Personnel Expenses	\$	4,127,590	\$	4,964,045	\$	30,825,311

Operating Expenses

Instructional Expenses			\$	-	\$	2,182,364
Professional Development	\$	48,400	\$	35,107		
Instructional Materials & Resources	\$	74,720	\$	67,793		
Intervention Tools	\$	37,861	\$	47,019		
Data & Assessment Tools	\$	6,675	\$	8,290		
ExEd Contract Services	\$	90,000	\$	111,769		
Staff Recognition & Events	\$	7,000	\$	8,693		
Staff Recruitment	\$	25,250	\$	31,357		
ExEd Outplacement Services	\$	133,940	\$	166,337		
School Day Extension	\$	12,000	\$	14,902		
			\$	-		
Student Support Expenses			\$	-	\$	678,196
Student Recognition & Events	\$	15,920	\$	19,771		
College Trips	\$	15,184	\$	18,857		
Graduation and Promotion	\$	3,500	\$	4,347		

	2022-2023	24-25	24-25
	Board Approved	Anticipated	Anticipated
	Budget: Neely's	Budget: Neely's	Budget: LEAD
	Bend	Bend	Public Schools
			Network
Enrollment	423	500	2,550
Student Recruitment	\$ 9,000	\$ 16,177	
Extracurricular Activities & Field Trips	\$ 11,500	\$ 14,282	
Family Engagement	\$ 15,405	\$ 19,131	
School Operations			\$ 1,757,153
Supplies & Equipment	\$ 69,400	\$ 86,186	
Copier Lease	\$ 41,768	\$ 51,871	
Technology	\$ 25,500	\$ 31,668	
Athletic Expense	\$ 64,000	\$ 79,480	
Nursing Services	\$ 46,700	\$ 57,995	
Security	\$ 50,500	\$ 62,715	
Phones	\$ 4,000	\$ 4,967	
Facility Related Expenses		\$ -	
Rent	\$ 131,982	\$ 495,655	\$ 1,147,869
Repairs & Maintenance	\$ 78,000	\$ 81,949	\$ 509,796
Custodial Services	\$ 163,980	\$ 172,281	\$ 672,797
Electricity	\$ 140,000	\$ 147,088	\$ 655,598
Gas	\$ 6,000	\$ 6,304	\$ 41,395
Water	\$ 9,000	\$ 9,456	\$ 73,615
		\$ -	
Contracted Services			
Food Service	\$ -	\$ -	\$ -
Transportation	\$ 456,042	\$ 725,375	\$ 3,488,029
		\$ -	\$ -
Other Charges		\$ -	\$ -
Authorizer Fee	\$ 160,172	\$ 244,620	\$ 429,138
Management Fee	\$ 954,623	\$ 1,214,945	\$ -
		\$ -	\$ -
General & Administrative Costs		\$ -	\$ -
Financial Services			\$ 50,000
Audit Services			\$ 70,000
Legal Fees			\$ 50,000
Professional Development			\$ 100,000
LEAD University			\$ 45,000
Office & Admin supplies & equipment			\$ 30,000
Senior Signing Day			\$ 100,000
IT Contract Services			\$ 450,000
HR & Payroll Fees			\$ 100,000

	2022-2023	24-25	24-25
	Board Approved	Anticipated	Anticipated
	Budget: Neely's	Budget: Neely's	Budget: LEAD
	Bend	Bend	Public Schools
			Network
Enrollment	423	500	2,550
General Liability Insurance			\$ 85,000
Fundraising Expenses			\$ 50,000
Marketing & Communications			\$ 100,000
Staff Recognition & Events			\$ 20,000
Talent Recruitment			\$ 75,000
Family Engagement			\$ 15,000
Academic Contracted Services & Consulting			\$ 200,000
Network Facilities Costs			\$ 30,000
Data Infrastructure			\$ 200,000
Total Operating Expenses	\$ 2,908,022	\$ 2,184,940	\$ 13,405,950
Total Expenses	\$ 7,035,612	\$ 7,148,985	\$ 44,231,261
Total Revenue	\$ 8,339,707	\$ 8,501,569	\$ 45,826,070
Total Expenses	\$ 7,035,612	\$ 7,148,985	\$ 44,231,261
EBITDA	\$ 1,304,095	\$ 1,352,584	\$ 1,594,808
Interest Income			\$ 35,000
Depreciation			\$ 1,500,000
Net Income			\$ 129,808
Capital Investments			\$ -
Building Improvements			\$ 500,000
Furniture & Fixtures			\$ 25,000
Technology			\$ 500,000
Total Capex			\$ 1,025,000
Net Cash			\$ 604,808

K: SY22-23 Approved Budget and SY23-24 Projected Budget
M: Network Financial Plan

Version that includes detailed assumptions by line item

2022-2023 Board Approved Budget: Neely's Bend 423				24-25 Anticipated Budget: Neely's Bend 500				24-25 Anticipated Budget: LEAD Public Schools Network 2,550				
Enrollment												
Revenue												
State Revenues	Rate/ Assumpti on	Budget	Assumption Notes	Inflation rate	Rate/ Assumpti on	Budget	Assumption Notes	Rate/ Assumpti on	Budget	Assumption Notes		
Basic Education Program	\$15,146	\$ 6,406,868		3.0%	\$16,308	\$ 8,153,995	See narrative for details- blend of anticipated TISA + Current BEP Forecast	\$16,454	\$ 41,958,338	See narrative for details- blend of anticipated TISA + Current BEP Forecast		
BEP Transportation Component	\$0	\$ -	N/A- ASD rolls transportation component into BEP	0.0%	\$0	\$ -	N/A- included in TISA	\$0	\$ -	N/A- included in TISA		
BEP Capital Outlay	\$0	\$ -	N/A- ASD rolls capital outlay into BEP	0.0%	\$0	\$ -	N/A- included in TISA	\$0	\$ -	N/A- included in TISA		
Charter School Facilities Funding	\$0	\$ -	Conservatively, not estimated for current year	0.0%	\$0	\$ -	N/A- included in TISA	\$0	\$ -	N/A- included in TISA		
Turnaround Action Grant	\$632	\$ 267,143	Estimate provided by ASD prior to beginning of SY	0.0%	\$632	\$ -	N/A	\$0	\$ -	N/A		
Federal Revenues												
Title I	\$1,583	\$ 669,713	Estimate provided by ASD prior to beginning of SY	0.0%	\$1,050	\$ 229,935	Per Dir. Cert (ED) Student	\$767	\$ 1,954,900	Proportional to current rates (\$ per total ADM) + NB		
Title II	\$77	\$ 32,674	Estimate provided by ASD prior to beginning of SY	0.0%	\$952	\$ 34,272	Per Licensed Teacher	\$57	\$ 144,511	Proportional to current rates (\$ per total ADM) + NB		
Title III	\$0	\$ -	n/a- Title III not allocated in ASD schools	0.0%	\$87	\$ 28,493	Per EL student	\$0	\$ 28,493	NB only		
Title IV				0.0%	\$19	\$ 1,930	Per Dir. Cert (ED) Student	\$0	\$ 1,930	NB only		
Title V					\$0	\$ -		\$0	\$ -			
NSLP	\$0	\$ -			\$0	\$ -		\$0	\$ -			
E-Rate	\$0	\$ -	n/a for current year		\$0	\$ -		\$0	\$ -			
CSP Startup Grant	\$0	\$ -			\$0	\$ -		\$0	\$ -			
IDEA	\$376	\$ 158,909	Estimate provided by ASD prior to beginning of SY	0.0%	\$857	\$ 47,480	Per SWD	\$256	\$ 524,434	Proportional to current rates (\$ per total ADM) + NB		
ESSER	\$1,891	\$ 800,000			\$0	\$ -		\$0	\$ -			
Other	\$0	\$ -			\$0	\$ -		\$0	\$ -			
School Activity Revenues												
School Income: Athletics		\$ 4,400	Income from Athletic Concessions & Ticket Sales	2.5%		\$ 5,464	See note in current year; scaled for students & inflation	\$0	\$ 5,464	See note in current year; scaled for students & inflation		
Student Fees	\$0	\$ -	n/a- LEAD does not charge student fees		\$0	\$ -		\$0	\$ -			
Fundraising & Philanthropy												
Fundraising Events	\$0	\$ -						\$	500,000	Based on current actuals		
Fundraising- Individual Donations	\$0	\$ -						\$	400,000	Based on current actuals		
Fundraising- Private Grants	\$0	\$ -						\$	300,000	Based on current actuals		
Billboard Revenue	\$0	\$ -						\$	8,000	Based on current actuals		
Total Revenues		\$ 8,339,707				\$ 8,501,569			\$ 45,826,070			
EXPENSES												
PERSONNEL EXPENSES												
School Leadership												
Principal	FTE Count	1.0	\$ 120,000	Salaries based on current	3.5%	1.0	\$ 128,547	Salaries based on inflator	FTE Count	6.0	\$ 771,282	All personnel based on current headcount + NB adjustments at annual inflator
Asst Principal of Instruction	2.0	\$ 170,000			3.5%	2.00	\$ 182,108		11.00	\$ 1,001,595		
Asst Principal of Students	1.0	\$ 75,000			3.5%	1.00	\$ 80,342		6.00	\$ 482,051		
Dir of School Operations	0.5	\$ 32,500			3.5%	1.00	\$ 69,630		4.00	\$ 278,519		
Total School Leadership	4.5	\$ 397,500			3.5%	5.00	\$ 460,627		27.00	\$ 2,533,447		
Instructional Leadership												
Instructional Manager	4.0	\$ 260,000			3.5%	6.00	\$ 417,778		25.00	\$ 1,740,741		
Instructional Manager: ELL	1.0	\$ 55,000			3.5%	1.00	\$ 58,917		5.00	\$ 294,587		
Assistant Director of Data & Assessment Tech	1.0	\$ 50,000			3.5%	1.00	\$ 53,561		4.00	\$ 214,245		
Total Instructional Leadership	6.0	\$ 365,000			3.5%	8.00	\$ 530,256		34.00	\$ 2,249,573		
Instructional Staff												

	2022-2023 Board Approved Budget: Neely's Bend			24-25 Anticipated Budget: Neely's Bend			24-25 Anticipated Budget: LEAD Public Schools Network				
		423			500			2,550			
Enrollment											
Teacher	27.0	\$	1,404,000	4.0%	31.00	\$	1,743,539	167.00	\$	9,392,614	
Reading Interventionist	4.0	\$	180,000	3.5%	4.00	\$	192,821	16.00	\$	771,282	
Media Specialist	1.0	\$	52,000	3.5%	1.00	\$	55,704	2.00	\$	111,407	
Substitute- LT	2.0	\$	70,000	3.5%	2.00	\$	74,986	15.00	\$	562,393	
ExEd Instructional Manager	1.0	\$	65,000	3.5%	1.00	\$	69,630	8.00	\$	557,037	
Exceptional Education Teacher	5.0	\$	275,000	4.0%	5.00	\$	297,440	29.00	\$	1,725,152	
ExEd Assistant	3.0	\$	120,000	3.5%	3.00	\$	128,547	19.00	\$	814,131	
Total Instructional Compensation	43.0	\$	2,166,000	3.5%	47.00	\$	2,562,666	256.00	\$	13,934,017	
Student Support Staff											
Counselor	2.0	\$	100,000	3.5%	2.00	\$	107,123	14.00	\$	749,858	
Student Support Coordinator	3.0	\$	135,000	3.5%	3.00	\$	144,615	17.00	\$	819,487	
Total Student Support Staff	5.0	\$	235,000	3.5%	5.00	\$	251,738	31.00	\$	1,569,345	
Operations											
Family Engagement Coordinator	1.0	\$	45,000	3.5%	1.00	\$	48,205	6.00	\$	289,231	
Office Manager	1.0	\$	45,000	3.5%	1.00	\$	48,205	6.00	\$	289,231	
Receptionist	1.0	\$	35,000	3.5%	2.00	\$	74,986	4.00	\$	149,972	
Operations Associate	1.0	\$	50,000	3.5%	1.00	\$	53,561	4.00	\$	214,245	
Total Operations	4.0	\$	175,000	3.5%	5.00	\$	224,957	20.00	\$	942,678	
Administration											
Executive & Head of Schools								3.00	\$	477,405	Current headcount
Development & Marketing								3.00	\$	286,443	Current headcount
Academic								16.00	\$	1,442,824	Increased headcount for additional academic support
Finance								5.00	\$	477,405	Current headcount
Operations & Data								6.00	\$	572,886	Current headcount
HR								6.00	\$	541,059	Increased headcount for additional staff recruiting
Family Engagement								3.50	\$	222,789	Increased headcount for additional student recruiting
Total Administration	-	\$	-	0.00	\$	-	0.00	42.50	\$	4,020,811	
Total Employee Salaries	62.5	\$	3,338,500	70.0	\$	4,030,244	410.5	\$	25,249,870		
Benefits & Taxes											
Employee- Payroll Tax- SS	6.2%	\$	206,987	0.0%	6.2%	\$	249,875	6.2%	\$	1,565,492	Based on current actual rates
Employee- Payroll Taxes- Med	1.5%	\$	48,408	0.0%	1.5%	\$	58,439	1.5%	\$	366,123	Based on current actual rates
Payroll Taxes - Unemployment	0.2%	\$	5,889	0.0%	0.2%	\$	7,110	0.2%	\$	44,544	Based on current actual rates
Employee- Insurance	\$4,000	\$	250,000	5.0%	\$4,410	\$	308,700	\$4,410	\$	1,810,305	Based on current actual rates
Ee Benefits - Dental	\$300	\$	18,750	5.0%	\$331	\$	23,153	\$331	\$	135,773	Based on current actual rates
Ee Benefits - Other Fringe	\$200	\$	12,500	5.0%	\$221	\$	15,435	\$221	\$	90,515	Based on current actual rates
Employee- Workers Comp	0.2%	\$	6,677	0.0%	0.2%	\$	8,060	0.2%	\$	50,500	Based on current actual rates
Employee- Retirement TCRS Pension & 401k	9.5%	\$	229,816	0.0%	9.5%	\$	250,882	9.5%	\$	1,322,816	Based on current actual rates
Employee- Retirement Support 403b	0.3%	\$	10,063	0.0%	0.3%	\$	12,148	0.8%	\$	189,374	Based on current actual rates
Total Employer Benefits & Taxes		\$	789,090			\$	933,801		\$	5,575,441	
Total Personnel Expenses		\$	4,127,590			\$	4,964,045		\$	30,825,311	
Operating Expenses											
Instructional Expenses								\$856	\$	2,182,364	Based on all instructional spend; scaled for students & inflation
Professional Development	\$	48,400	Relay program for school leaders; teacher and staff conferences; PD Day supplies & food	2.5%	\$	35,107	All expenses- see note in current year; scaled for students & inflation				
Instructional Materials & Resources	\$	74,720	Curriculum, materials for all content areas	2.5%	\$	67,793					
Intervention Tools	\$	37,861	Intervention program fees	2.5%	\$	47,019					
Data & Assessment Tools	\$	6,675	Testing & Assessment costs including MAP	2.5%	\$	8,290					
ExEd Contract Services	\$	90,000	Project Play & compensatory services	2.5%	\$	111,769					

	2022-2023 Board Approved Budget: Neely's Bend				24-25 Anticipated Budget: Neely's Bend				24-25 Anticipated Budget: LEAD Public Schools Network				
	423				500				2,550				
Enrollment													
Staff Recognition & Events	\$	7,000	Teacher appreciation, staff celebrations	2.5%	\$	8,693							
Staff Recruitment	\$	25,250	TFA, NTR & Relay fees	2.5%	\$	31,357							
ExtEd Outplacement Services	\$	133,940	Genesis, Cora Howe, Murrell outplacement fees	2.5%	\$	166,337							
School Day Extension	\$	12,000	Summer school stipends	2.5%	\$	14,902							
					\$	-							
Student Support Expenses									\$266	\$	678,196	Based on all student support spend; scaled for students & inflation	
Student Recognition & Events	\$	15,920	School Joy/Celebrations, Social Emotional Learning supports	2.5%	\$	19,771							
College Trips	\$	15,184	Transportation to visit colleges & career exposure	2.5%	\$	18,857							
Graduation and Promotion	\$	3,500	Promotion ceremony costs	2.5%	\$	4,347							
Student Recruitment	\$	9,000	Marketing materials and recruitment events	2.5%	\$	16,177	Increased investment as a result of expanded zone.						
Extracurricular Activities & Field Trips	\$	11,500	Field trips, clubs, extracurriculars	2.5%	\$	14,282							
Family Engagement	\$	15,405	Family communication platforms, events	2.5%	\$	19,131							
School Operations									\$689	\$	1,757,153	Based on all school operations spend; scaled for students & inflation	
Supplies & Equipment	\$	69,400	Student supplies, office supplies, paper & teacher reimbursements	2.5%	\$	86,186							
Copier Lease	\$	41,768	Copier Lease per contract	2.5%	\$	51,871							
Technology	\$	25,500	Non-capitalized tech repairs, maintenance for Chromebooks, projectors, etc	2.5%	\$	31,668							
Athletic Expense	\$	64,000	Athletic coach payments, equipment, materials, transportation	2.5%	\$	79,480							
Nursing Services	\$	46,700	Nursing services	2.5%	\$	57,995							
Security	\$	50,500	SRO & safety supplies	2.5%	\$	62,715							
Phones	\$	4,000	Landline phones	2.5%	\$	4,967							
Facility Related Expenses													
Rent	1.33	\$	131,982	\$1.33 per sqft x 99131 sq ft per MNPS lease	\$5.0	\$	495,655	\$5 per sqft x 99131 sq ft per MNPS lease	\$	1,147,869	Based on current facilities + NB increased rent		
Repairs & Maintenance	\$	78,000	General repairs, HVAC, painting	2.5%	\$0	\$	81,949		\$	509,796	Based on current facilities; scaled for inflation		
Custodial Services	\$	163,980	ABM services per contract	2.5%	\$0	\$	172,281		\$	672,797	Based on current facilities; scaled for inflation		
Electricity	\$	140,000	Based on current billing	2.5%	\$0	\$	147,088		\$	655,598	Based on current facilities; scaled for inflation		
Gas	\$	6,000	Based on current billing	2.5%	\$0	\$	6,304		\$	41,395	Based on current facilities; scaled for inflation		
Water	\$	9,000	Based on current billing	2.5%	\$0	\$	9,456		\$	73,615	Based on current facilities; scaled for inflation		
							\$	-					
Contracted Services													
Food Service	\$0	\$	-	n/a- currently provided by MNPS	\$	-	Assuming MNPS status quo but prepared to budget income/expenses if needed		\$0	\$	-	Assuming MNPS status quo but prepared to budget income/expenses if needed	
Transportation	\$7	\$	456,042	7 gened routes; 1 exed route; 1/2 outplacement route	4.0%	\$0	\$	725,375	10 gened routes; 2 exed route; 1/2 outplacement route	\$0	\$	3,488,029	Based on current contract, scaled for NB
							\$	-			\$	-	
Other Charges													
Authorizer Fee	\$0	\$	160,172	2.5% of BEP to Achievement School District	3.0%	\$	244,620	3% of TISA to TN Charter Commission	\$	429,138	MNPS, ASD & TN Charter Commission Fees		
Management Fee	14.9%	\$	954,623	Management fee for Network support including admin, financial, legal, tech services and capitalized expenses	0.0%	14.9%	\$	1,214,945	See note in current year	\$	-	Management fee is an internal transfer on a consolidated basis	
							\$	-			\$	-	
General & Administrative Costs							\$	-			\$	-	
Financial Services			n/a- see Network budget				\$	-	n/a- see Network budget		\$	50,000	Accounting and billing systems; Bank Fees

	2022-2023 Board Approved Budget: Neely's Bend 423	24-25 Anticipated Budget: Neely's Bend 500	24-25 Anticipated Budget: LEAD Public Schools Network 2,550
Enrollment			
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
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
Network Facilities Costs			\$ 30,000 Office & facilities expense for network team
Data Infrastructure			\$ 200,000 Computer Software, SIS integration, Data platforms
Total Operating Expenses	\$ 2,908,022	\$ 2,184,940	\$ 13,405,950
Total Expenses	\$ 7,035,612	\$ 7,148,985	\$ 44,231,261
Total Revenue	\$ 8,339,707	\$ 8,501,569	\$ 45,826,070
Total Expenses	\$ 7,035,612	\$ 7,148,985	\$ 44,231,261
EBITDA	\$ 1,304,095	\$ 1,352,584	\$ 1,594,808
Interest Income			\$ 35,000 Interest earned on cash
Depreciation			\$ 1,500,000 Network wide depreciation
Net Income			\$ 129,808
Capital Investments			\$ -
Building Improvements			\$ 500,000 Building improvements, HVAC replacements, capital repairs
Furniture & Fixtures			\$ 25,000 Furnitre replacements, as needed
Technology			\$ 500,000 Annual refresh of student, staff computers & classroom tech
Total Capex			\$ 1,025,000
Net Cash			\$ 604,808

L: Budget Narrative

As Attachment L, present a budget narrative including detailed descriptions of budget assumptions, and revenue and expenditure projections. The narrative must include:

- (a) *An explanation of student enrollment, TISA projections, and the anticipated transition from BEP to TISA;*

LEAD Public Schools has worked with charter partners to review the current TISA information and adopt and revise a calculator that anticipates both the TISA funding as well as the local option. Ultimately, the local share of TISA funding coupled with the City Council's decision to fund local extra will be the driver of the final TISA rate. TISA projections are based on the proportion of current student demographics, including direct certification, ExEd and ELL needs, yielding a TISA rate of \$10,079 per student at LEAD Neely's Bend for next year. The local extra component is based on the current (Nov 2022) district enrollment and the anticipated local contribution for the upcoming 23-24 school year. Overall, this yields a rate of \$16,216 per student at Neely's Bend for the 23-24 School Year. BEP funding has historically increased between 3% to 13% per year as a result of the combination of Nashville investing more local funding into education as well as slight declines in overall MNPS student enrollment. For our 24-25 school year, we are estimating a 3% per year inflator on TISA, yielding a true estimate of \$16,702. Given the uncertainty of the local component, however, we have chosen to back down our estimated TISA funding by averaging our anticipated TISA rate with our current BEP forecast. This final adjustment brings our TISA rate down from \$16,702 per student to \$16,308 per student and builds in added conservatism into our overall financial model. The same process was used to inform the individual TISA rates across the LEAD network for the network financials. Due to network demographics, the anticipated rate is \$16,434.

- (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 assumptions include:

Consolidated funding- the current budget for IDEA, Title I, Title II were provided by the Achievement School District for the current year. Under the TN Charter Commission, we will transition to the consolidated federal funding application. Assumptions for rates were based on rates provided by the TN Charter School Commission and applied to our current student demographics with a 0% inflator per year.

ESSER funding- the current budget includes our best estimate for our annual drawdown of ESSER 2 and ESSER 3 funding, which will be fully expended prior to the 24-25 school year.

eRate- we do not anticipate any eligible erate projects in the current or 24-25 school year but have a proven history of using this funding should the appropriate project be needed. If it were, it would be cost neutral, with any funding be used by new expenditures.

School income consists of a nominal amount for athletic concession stands and athletic game tickets. LEAD Neely's bend does not charge student fees.

Donations to LEAD Public Schools are held at the network level unless a donor specifically restricts funding to LEAD Neely's Bend.

(c) An explanation of all anticipated expenditures including those identified in Section 3.1(b);

Personnel – (Salaries and Benefits). FY23 salaries by position are based on actual salaries. The projection assumes that all teacher salaries increase at 4% per year and other staff at 3.5% annually, based on prior year actuals. Our performance comp program yields increases of about 5-6% per year but this is partially offset by hiring new staff who are less experienced, resulting in a blended rate of 4%, or 3.5% for non-teachers, per year. Employee insurance benefits are based on current actuals and are expected to increase at 5% per year. Retirement is based on actual rates and increases proportionally to salaries.

Operational Expenses- LEAD has been operating LEAD Neely's Bend for the past seven years and reviews longitudinal data to inform future estimates of both baseline costs and inflationary pressures. All expenses in the current budget and 24-25 anticipated budget are based on either real expenditures incurred in the prior year or quotes provided by new vendors for new programming. Unless otherwise identified, we have scaled up the 24-25 budget line items to reflect both a proportional increase per student as well as a 2.5% per year inflator. Historically, LEAD has negotiated contracts with vendors, capitalized on finding economies of scale across our network investments and trained individual School Leadership team members to consider the ROI of both new and existing investments. As a result, in many cases, we have seen operating expense spend per student decline slightly year over year. This historical net decrease per year, offset by increased inflation nationally yields a conservative 2.5% inflator overall in most operational line items.

Instructional Expenses- Instructional expenses are outlined by category and include all the instructional materials, curriculum, and special populations support, as well as expenses related to teacher effectiveness, including PD and recruitment. Costs associated with ExEd contract services are included in this category and are based on real costs of the current needs of our students. We do not anticipate any material change to the underlying costs associated with instructional expenditures in the future. Any investment in new curriculum, for example, would be offset by moving away from a current resource.

Student Support expenses- Student support expenses are outlined by category and include all the costs associated with promoting social emotional learning, student joy, access to college and career options, extracurriculars and family engagement support. Transportation related to extracurricular and college trips is also included in this category. We do anticipate final spend in the 22-23 school year to come in \$5-\$10K above our board approved budget attached in the area of student recruitment and family engagement as we invest more heavily in recruiting in an expanded zone. This increase is included in future assumptions as well.

School Operations expenses- School operations expenses outlined by category and include supplies, equipment and other costs associated with the day to day operations of the school, along with athletic, nursing and security services. Capital assets (such as student and staff computers and furniture) costing more than \$1,000 and having a useful life of greater than 3 years, are included within the network budget. We do not anticipate any material change to the underlying costs associated with school operations expenditures in the future.

Facility expenses- Facility expenses are outlined by category and include rent, custodial service, utilities and repairs and maintenance. Capital repairs costing more than \$1,000 and having a useful life of greater than 3 years, are included within the network budget. Facilities expenses are set at a 2.5% inflator but are not scaled on a per student basis. Notably, we have increased the assumed MNPS rental rate from \$1.33 in our current lease to \$5 per square foot to be in alignment with our other open enrollment charter schools (currently a \$4/square foot lease rate). See the section below for further context about our long term facilities expenditure

planning beyond the 24-25 school year.

Transportation expenses- Transportation expenses are budgeted based on number of routes and cost per route as outlined in our multiyear transportation contract. We have estimated a 4% inflator per our signed contract. In addition, we have increased the number of routes from 7 routes to 10 in order to expand our geographic zone, as well as added a second exceptional education route with a monitor. We plan to continue sharing a single route for students who are bussed to special day schools, although this might be an area of savings if we do not have a student who requires that service.

Authorizer fees- Authorizer fees reflect the shift from 2.5% of BEP at the ASD to 3% of TISA at the TN Charter Commission.

Management fees- Management fees are currently set at 14.9% of BEP and we anticipate that rate will remain steady in future years. This management fee provides all network support and network administrative, financial, legal, technology and capitalized expenses which are outlined in the network budget. Specifically, see the Network budget for assumptions around equipment, furniture, technology, SIS implementation, audit, finance, IT, fundraising, marketing, capital, contingency and insurance costs.

(d) An explanation of who is responsible for the school's financials (both school 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 monthly 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 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.

(e) 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. Neely's Bend 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.

(f) 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
- Student Information System (currently provided at no cost by LEA)

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.
- Contract services to support the transition to the new Student Information System and reconnection of all data systems. Note that this will impact the 22-23 actual financials but not future budgeting years.
- To support the additional staff recruiting and student recruiting anticipated as a result of increasing enrollment, we plan to add another FACE (Family Engagement Coordinator) and Talent Recruiter at the Network level.

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 Neely's Bend 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 both Neely's Bend and the LEAD Network to accommodate a loss, if realized.
- Rent or Debt Service for Facility- Our lease with MNPS for the facility currently ends on 6/30/2025, which is the end of the term we are applying for authorization under the TN Charter School

Commission. Therefore, we do not anticipate any material changes to our underlying facilities costs during the remainder of this charter term. That said, we do anticipate a new lease effective summer 2025 through, at minimum, the 25-26 school year and need to have strong contingency plans in place and the financial flexibility to pivot to an increased cost structure should either the rental rate of the existing facility significantly increase in 25-26 or should we need to pursue an alternate facility, beginning in 26-27.

- Finally, while not an increased costs, the current rate of federal funding, especially Title I and IDEA, available to schools authorized by the TN Charter Commission is significantly less than we have received under the Achievement School District. These lowered rates are factored into our current financial forecast.

Our current plan is to hold our overall staffing ratios at LEAD Neely's Bend to be the same as they are today (ie increasing salaries and overall number of staff members in proportion to student enrollment but not expanding the overall staffing model), generating a positive EBITDA. This provides cushion should our facilities costs increase significantly higher than the \$5 per square foot provided in the estimate and sets up Neely's Bend to be able to take on more debt service, beginning in the 25-26 School Year should alternate facilities need to be considered

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, 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.

(b) Provide, as Attachment M, a detailed budget for the network. You may reference the school-level budgets provided in Sections 3.1 and 3.2, as appropriate.

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 student enrollment across the network, adjusted for an expanded enrollment zone at Neely’s Bend. In considering future enrollment, we consider our current enrollment, historical trends, changing demographics in our geographic areas and competition for other students. 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.

Philanthropy: LEAD is dedicated to actively raising philanthropic funds for the benefit of its students. LEAD anticipates total philanthropic dollars of \$1.2M 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. In order to be conservative, we have not included an anticipated \$1.7M annual extension to the LEAD TSL grant through the Federal Department of Education.

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.

LEAD currently leases three of four facilities through MNPS and does not anticipate any changes to its lease terms for Cameron or Brick Church. See above for facilities assumptions for LEAD Neely's Bend. LEAD Public Schools owns the Metroplex facility housing LEAD Southeast and has fully paid off its loan, therefore incurring no debt service.

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 Neely's Bend. Total employee compensation of the home office is \$4M. \$0 of that is allocated to Neely's Bend. Instead, any overhead is paid for by the 14.9% 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.

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 2-4% 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 \$27M in net assets with \$15M 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 Neely's Bend or another school. The proposed 24-25 Budget attached evidences an EBITDA of \$1.6M (representing a 3.6% contingency), and a positive net cash flow of \$650K after accounting for interest earned and capital expenditures.

Achievement School District
2020-21 School Performance Framework (SPF) Evaluation
School Name: Neely's Bend

Part A: Introduction

As a condition of their formal contracts with the Achievement School District, all participating charter schools agreed to 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 include 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.”¹
- “An Operator must meet 100% of financial metrics. Failure to do so would result in an automatic “Does Not Meet” for all schools.”²

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 Composite³.

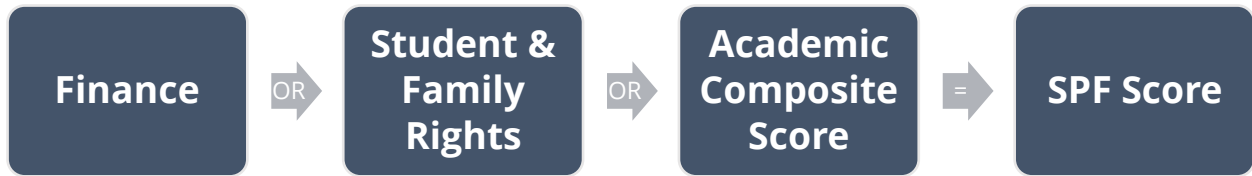
Category	Description	Metrics
Finance	The metrics in this category are measured at the operator level and ensure operators are financially responsible and viable. ⁴	<ul style="list-style-type: none"> • Cash on hand • Threshold ratio • Financial audit
Student & Family Rights	The metrics in this category are measured at the school level and ensure school compliance with significant legal obligations.	<ul style="list-style-type: none"> • Access • Enrollment • Health & safety • Leadership • Voice
Academic Composite Score³	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. No Adverse Action: TCA § 49-1-609	<ul style="list-style-type: none"> • Mission • School progress • Student progress • Equity • College & Career

¹ Tennessee Achievement School District Charter Agreement Sections 2 & 3

² ASD Accountability: School Action Framework, 2015-16 Hold Harmless Review & 2016-17 School Performance Framework

³ In alignment with TCA § 49-1-609, there will be no adverse action for schools not meeting academic expectations

The school's overall SPF rating is based upon each category rating, which is in turn based upon the specific metrics.

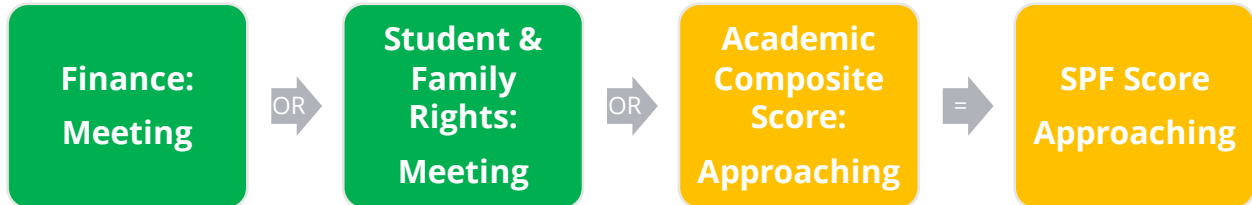


The school's rating for each category as well as the overall rating falls into one of four possible classifications:



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



Methodology Notes

At the time of the framework's adoption, every school was classified as either a K-8, high school, Alternative Education for SPF tabulation purposes. As the ASD no longer has any exclusively K-2 sites, current tabulations are based on each school being classified as either a K-8, high school, or alternative education campus.

Modifications to this methodology were made only in those instances in which changes to assessments rendered former metrics moot and after discussions with CMO leaders. In those cases, those changes have been noted, supplied to operators prior to the SPF meetings and explicitly noted in the summary in an effort to align with the original data point.

Calculations for two of the three SPF categories were made by the offices listed below and are available for review by written request to Dr. Sharon Smith (Chief of Federal Programs), Michael Bates (Chief of Schools & Student Services) or Alethea Henry (Chief of Academics and Instructional Support).

School Performance Framework Rubrics

Finance Category Rubric				
Metric	Does Not Meet	Approaching	Meeting	Exceeding
Cash on hand	Less than 30 days cash on hand	<i>N/A – this rating is not available for this metric</i>	30 days cash on hand	More than 30 days cash on hand
Threshold	Less than a 1:1 ratio	<i>N/A – this rating is not available for this metric</i>	Equal to a 1:1 ratio	More than a 1:1 ratio
Financial audit	Issues with audit	<i>N/A – this rating is not available for this metric</i>	Clean financial audit	<i>N/A – this rating is not available for this metric</i>
Overall Rating: <ul style="list-style-type: none"> Failure to receive a rating of "Meeting" for any metric in this category would result in an automatic "Does Not Meet" for this category. An operator could receive a rating of "Exceeding" for this category if two of three metrics are rated as "Exceeding." 				

Student & Family Rights Category Rubric				
Metric	Does Not Meet (0pts)	Approaching (1pt)	Meeting (2pts)	Exceeding
Access: Right to Special Services	Egregious non-compliance	Only one of the following is true: <ul style="list-style-type: none"> ASD has verified the appropriate provision of special education services for all qualifying students ASD has received no complaints or statements of concern indicating any underlying issues in the school's delivery of special services. 	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.	<i>N/A – this rating is not available for this metric</i>
Enrollment: Right to School Choice & Equitable Environment	Egregious non-compliance	Only one of the following is true: <ul style="list-style-type: none"> ASD has verified the school's application processes comply with all state and local requirements ASD has received no complaints or statements of concern indicating that the school's systems foster inequitable school offerings. 	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.	<i>N/A – this rating is not available for this metric</i>
Health & Safety	Egregious non-compliance	Only one or two of the following is true:	The school's facilities have met local and state requirements for	<i>N/A – this rating is not available for this metric</i>

Student & Family Rights Category Rubric				
Metric	Does Not Meet (0pts)	Approaching (1pt)	Meeting (2pts)	Exceeding
		<ul style="list-style-type: none"> The school's facilities have met local and state requirements for fire safety and occupancy. The school meets district health and safety standards. ASD has received no complaints or statements of concern indicating that the school presents a risk to health or safety of students, staff, or families. 	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 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.	<i>N/A – this rating is not available for this metric</i>
Voice: Right to be Included/Informed	Egregious non-compliance	ASD has observed practices at the school that demonstrate active engagement with families & community stakeholders.	ASD has observed practices at the school that demonstrate active engagement with families & community stakeholders.	<i>N/A – this rating is not available for this metric</i>
<p>Overall Rating:</p> <ul style="list-style-type: none"> 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.” 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 determine from that score (Does Not Meet ≤0; Approaching = 1-1.99; Meeting ≥ 2.0) 				

Academic Composite Category Rubric					
Metric	Measure	Method of Calculation	Target	Weight K8/HS/Alt	Score Earned
Mission	R-SSR Percentile Rank	<ul style="list-style-type: none"> R-SSR \geq 6% OR Annual Measureable Objective (AMO) 	For full points, must meet or exceed SSR of 6% OR meet AMO target in one of the content areas (ELA or Mathematics). Meet AMO - 10 points Exceed AMO or meet/exceed SSR of 6% - Earn 15 points Year 5 or above target: \geq 50 th percentile	15/15/10 pts	<u>N/A</u>
School Progress	Progress on Components of R-SSR	<ul style="list-style-type: none"> Progress on Components of Reward School Success Rate (R-SSR/Subject TVAAS) 	The greater level of performance – subject TVAAS or gain in proficiency from the prior year (HS/Alt Ed only) – determines the school's performance rating and points earned. Subjects measured are Math, RLA, Science, A1, A2, E1, E2, E3, B1 and GR* Graduation Rate target gains are 6/7/8 points to A/M/E respectively.	30/20/15 pts	<u>N/A</u>
Student Progress	Composite TVAAS	<ul style="list-style-type: none"> Level 1: Significantly Below Expectations Level 2: Below Expectations Level 3: At Expectations Level 4: Above Expectations Level 5: Significantly Above Expectations 	Target for all schools: \geq Level 4 Meets; Level 5 Exceeds	30/20/20 pts	<u>N/A</u>
Equity	Progress on Components of R-SSR	<ul style="list-style-type: none"> R-SSR for each student sub-group as reported on the School Report Card- Student Sub-Groups: economically disadvantaged (ED), students with disabilities (SWD), English Learners (EL), and Black/Hispanic/Native American (BHN) 	Target for All Schools: Decrease number of students scoring Below or Approaching by 10% in all applicable subgroups.	10/10/10 pts	<u>N/A</u>
College & Career	Extended Graduation Rate Gains	<ul style="list-style-type: none"> A school's 4-Year cohort graduation rate, with the addition of any late graduates 	Target: 7 pt gains or Y1: \geq 5th; Y2: \geq 10th; Y3: \geq 25th; Y4: \geq 40th; Y5: \geq 50th (Same as 2016 SPF)	NA/10/5 pts	<u>N/A</u>
	Average ACT Score	<ul style="list-style-type: none"> The average ACT score for all tested Juniors 	Target: 14+ School's Year of Operation (Same as SPF)	NA/10/5 pts	<u>N/A</u>
Remanded Students	Credit Attainment	<ul style="list-style-type: none"> Percent of student credits attained of the total set in place 	Target for all schools: 50%/70%/90%	NA/NA/10 pts	<u>N/A</u>
	ILP Goal Attainment	<ul style="list-style-type: none"> Percent of student ILP goals completed of the total set in place 	Target for all schools: 50%/70%/90%	NA/NA/10 pts	<u>N/A</u>
Academic Composite Score					<u>N/A</u>

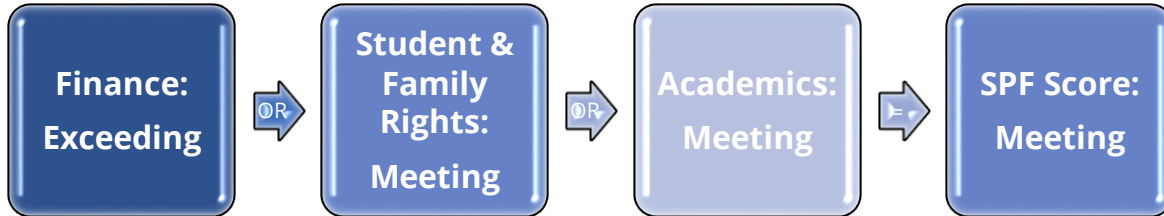
** This measure was previously labeled "Focus School Success Rate Progress" in SPF literature but has been re-named for clarity as ASD schools may not be officially "Focus" campuses. The metric itself remains the same.*

***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."*

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 2020-21 academic, financial, and stakeholder data.

Based on data from the 2020-21 academic year, received the following scores:



Neely's Bend's overall SPF rating based on 2020-21 data is **"Meeting."**

Category & Metric Detail

Finance Category		
Metric	Performance	Metric Rating
30 Days Cash on Hand	Operator has more than 30 days cash on hand.	Exceeding
Threshold Ratio	Operator has more than a 1:1 threshold ratio	Exceeding
Financial Audit	<i>There were no major findings. The audit did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses.</i>	Meeting
Overall Category Rating		Exceeding

Student & Family Rights Category		
Metric	Performance	Metric Rating
Access: Right to Special Services	Neely's Bend experienced some challenges serving students with disabilities. Areas of improvement: IEP Compliance and Suspensions/Expulsions. Neely's Bend did not experience challenges with identifying, enrolling, and serving students in special populations (ESL, Homeless, Foster Care, Migrant).	Meeting
Enrollment: Right to School Choice & Equitable Environment	ASD has received no complaints or statements of concern indicating that the school's systems foster inequitable school offerings.	Meeting

Student & Family Rights Category		
Health/Safety	ASD has received no complaints or statements of concern indicating that the school presents a risk to health or safety of students, staff, or families.	Meeting
Leadership: Right to Qualified Staff	All school faculty and administrators meet state and district standards for certification.	Meeting
Voice: Right to be Included/Informed	ASD has observed practices at the school that demonstrate active engagement with families & community stakeholders.	Meeting
Overall Category Rating		Meeting

Academic Composite Score Category*			
Metric	Performance	Score	Rating
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR: 10.3%	15	Meeting
School Progress: Progress on Components of R-SSR	Academic Percentile Rank: 10.3% Highest Subject TVAAS: 4	30	Exceeding
Student Progress: Composite TVAAS	TVAAS: 5	30	Exceeding
Equity: Progress on Components of SSR	Percent of Students who scored On Track or Mastered on TNReady/TCAP Assessments:	0	Does Not Meet
College & Career	N/A		
Remanded Students	N/A		
Academic Composite Score		75/85 =88.2%	
Overall Category Rating		Meeting	
<i>* is classified as a [K-8/high] school for the purpose of calculating campus academic composite scores.</i>			

Part D: Conclusions & Next Steps

The SPF employs a tiered targeting system that applies more rigorous performance expectations based on the number of years each school has been in operation. As the majority of ASD schools have now been in operation for at least five years, expected levels of achievement are now higher under SPF criteria than they would have been at earlier points in school timelines.

As stated in Section 2 of the ASD Charter Agreement, "If (SPF) 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."

All schools earning a rating of "Approaching" or "Does Not Meet in the Student and Family Rights" components of the SPF will be required to attend professional learning opportunities offered by the ASD. These sessions will provide school teams with the information on requirements, systems or processes that must be used to meet expectations.

**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 Behrnt 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>
ASSETS		
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
Total Assets	<u>\$ 24,033,254</u>	<u>\$ 14,615,210</u>
LIABILITIES AND NET ASSETS		
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
Total Liabilities and Net Assets	<u>\$ 24,033,254</u>	<u>\$ 14,615,210</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES

YEAR ENDED JUNE 30, 2021

	Without Donor Restriction	With Donor Restriction	Total
Public Support and Revenue:			
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)	-
Total Public Support and Revenue	42,697,487	45,000	42,742,487
Expenses:			
Student instruction and services	30,610,836	-	30,610,836
Administration	3,644,565	-	3,644,565
Fundraising	274,102	-	274,102
Total Expenses	34,529,503	-	34,529,503
Change in net assets	8,167,984	45,000	8,212,984
Net assets, beginning of year	7,596,104	-	7,596,104
Net assets, end of year	\$ 15,764,088	\$ 45,000	\$ 15,809,088

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

	Without Donor Restriction	With Donor Restriction	Total
Public Support and Revenue:			
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)	-
Total Public Support and Revenue	<u>34,176,721</u>	<u>(400,000)</u>	<u>33,776,721</u>
Expenses:			
Student instruction and services	29,872,795	-	29,872,795
Administration	3,305,392	-	3,305,392
Fundraising	262,316	-	262,316
Total Expenses	<u>33,440,503</u>	<u>-</u>	<u>33,440,503</u>
Change in net assets	736,218	(400,000)	336,218
Net assets, beginning of year	<u>6,859,886</u>	<u>400,000</u>	<u>7,259,886</u>
Net assets, end of year	<u>\$ 7,596,104</u>	<u>\$ -</u>	<u>\$ 7,596,104</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, 2021

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
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
Total Expenses	<u>\$ 30,610,836</u>	<u>\$ 3,644,565</u>	<u>\$ 274,102</u>	<u>\$ 34,529,503</u>

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
Total Expenses	\$ 29,872,795	\$ 3,305,392	\$ 262,316	\$ 33,440,503

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF CASH FLOWS

YEARS ENDED JUNE 30, 2021 AND 2020

	<u>2021</u>	<u>2020</u>
Cash flows from operating activities:		
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>
Cash flows from investing activities:		
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>
Cash flows from financing activities:		
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>
Supplemental disclosure of cash flow information:		
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

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

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

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:

	2021	2020
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>\$ 8,132,522</u>	<u>\$ 8,205,621</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:

<u>Year Ending June 30,</u>	
2022	\$ 377,505
2023	388,830
2024	400,495
2025	412,510
2026	424,885
Thereafter	<u>2,323,446</u>
	<u>\$ 4,327,671</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

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

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

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

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 Years Ended June 30, 2020 and 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

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, 2020 and 2019, 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 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, 2020 and 2019, 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.

Emphasis of Matter

As more fully described in Note 10 to the consolidated financial statements, LEAD Public Schools, Inc. and Affiliates has been impacted by the outbreak of the novel coronavirus (COVID-19), which was declared a global pandemic by the World Health Organization in March 2020. Our opinion is not modified with respect to this matter.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated December 29, 2020, 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 29, 2020

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

JUNE 30, 2020 AND 2019

	<u>2020</u>	<u>2019</u>
ASSETS		
Current Assets:		
Cash and cash equivalents	\$ 4,887,232	\$ 5,377,123
Accounts receivable	1,476,659	1,537,316
Prepaid expenses and other	45,698	460,062
Total Current Assets	<u>6,409,589</u>	<u>7,374,501</u>
Property and equipment, net	8,205,621	7,578,171
Construction in progress	-	330,000
Total Assets	<u><u>\$ 14,615,210</u></u>	<u><u>\$ 15,282,672</u></u>
LIABILITIES AND NET ASSETS		
Current Liabilities:		
Accounts payable	\$ 446,081	\$ 362,035
Accrued expenses	877,063	1,674,869
Other current liabilities	-	127,304
Notes payable, current portion	158,002	150,693
Total Current Liabilities	<u>1,481,146</u>	<u>2,314,901</u>
Notes payable, noncurrent portion	<u>5,537,960</u>	<u>5,707,885</u>
Total Liabilities	<u>7,019,106</u>	<u>8,022,786</u>
Net Assets:		
Without donor restriction	7,596,104	6,859,886
With donor restriction	-	400,000
Total Net Assets	<u>7,596,104</u>	<u>7,259,886</u>
Total Liabilities and Net Assets	<u><u>\$ 14,615,210</u></u>	<u><u>\$ 15,282,672</u></u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES

YEAR ENDED JUNE 30, 2020

	<u>Without Donor Restriction</u>	<u>With Donor Restriction</u>	<u>Total</u>
Public Support and Revenue:			
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)	-
Total Public Support and Revenue	<u>34,176,721</u>	<u>(400,000)</u>	<u>33,776,721</u>
Expenses:			
Student instruction and services	29,872,795	-	29,872,795
Administration	3,305,392	-	3,305,392
Fundraising	262,316	-	262,316
Total Expenses	<u>33,440,503</u>	<u>-</u>	<u>33,440,503</u>
Change in net assets	736,218	(400,000)	336,218
Net assets, beginning of year	<u>6,859,886</u>	<u>400,000</u>	<u>7,259,886</u>
Net assets, end of year	<u>\$ 7,596,104</u>	<u>\$ -</u>	<u>\$ 7,596,104</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, 2019

	Without Donor Restriction	With Donor Restriction	Total
Public Support and Revenue:			
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>
Expenses:			
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>\$ 6,859,886</u>	<u>\$ 400,000</u>	<u>\$ 7,259,886</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, 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
Total Expenses	\$ 29,872,795	\$ 3,305,392	\$ 262,316	\$ 33,440,503

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2019

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
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
Total Expenses	\$ 27,901,797	\$ 2,811,576	\$ 192,472	\$ 30,905,845

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF CASH FLOWS

YEARS ENDED JUNE 30, 2020 AND 2019

	<u>2020</u>	<u>2019</u>
Cash flows from operating activities:		
Change in net assets	\$ 336,218	\$ 764,210
Adjustments to reconcile change in net assets to net cash from operating activities:		
Depreciation	1,314,632	1,126,159
Changes in operating assets and liabilities:		
Accounts receivable	60,657	591,840
Prepaid expenses and other	414,364	(166,846)
Accounts payable	84,046	162,055
Accrued expenses	(797,806)	621,051
Other liabilities	(127,304)	127,304
Net cash flows from operating activities	<u>1,284,807</u>	<u>3,225,773</u>
Cash flows from investing activities:		
Purchase of property and equipment	<u>(1,612,082)</u>	<u>(964,674)</u>
Net cash flows from investing activities	<u>(1,612,082)</u>	<u>(964,674)</u>
Cash flows from financing activities:		
Proceeds from notes payable	-	38,480
Payments on notes payable	<u>(162,616)</u>	<u>(371,563)</u>
Net cash flows from financing activities	<u>(162,616)</u>	<u>(333,083)</u>
Net change in cash and cash equivalents	(489,891)	1,928,016
Cash and cash equivalents, beginning of year	<u>5,377,123</u>	<u>3,449,107</u>
Cash and cash equivalents, end of year	<u>\$ 4,887,232</u>	<u>\$ 5,377,123</u>
Supplemental disclosure of cash flow information:		
Cash paid during the year for interest	<u>\$ 251,796</u>	<u>\$ 255,193</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

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 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 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 eleven. 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 THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

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, 2020 and 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 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, 2020 AND 2019

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 – In accordance with FASB ASC guidelines, contributions are considered to be available for unrestricted use unless specifically restricted by the donor. Amounts received that are designated for future periods or restricted by the donor for specific purposes are reported as increases to net assets with donor restrictions. When a restriction is fulfilled, that is, when a stipulated time restriction ends or purpose restriction is accomplished, net assets are reclassified to net assets without donor restrictions and are reported in the statements of activities as net assets released from restrictions. However, 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.

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.

Adoption of New Accounting Pronouncement – In June 2018, 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 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 Organization adopted ASU 2018-08 during 2020. The adoption of this standard did not have a significant impact on the Organization's consolidated financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

Note 1—Nature of operations and summary of significant accounting policies (continued)

Accounting Policies for Future Pronouncements – In May 2014, 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, 2021. The Organization is currently evaluating the effect of the implementation of this new standard.

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 29, 2020, 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:

	<u>2020</u>	<u>2019</u>
Financial assets at June 30:		
Cash and cash equivalents	\$ 4,887,232	\$ 5,377,123
Accounts receivable	1,476,659	1,537,316
Total financial assets	6,363,891	6,914,439
Less amounts not available to be used for general expenditures within one year	-	(400,000)
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 6,363,891</u>	<u>\$ 6,514,439</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

Note 3—Property and equipment

Property and equipment consists of the following at June 30:

	2020	2019
Land	\$ 542,960	\$ 542,960
Buildings and improvements	8,159,459	7,319,420
Computer equipment	2,687,904	1,915,783
Furniture and fixtures	421,224	398,150
Office equipment	138,962	140,283
Textbooks	166,177	166,177
Leasehold improvements	1,357,296	1,049,127
School buses	426,284	426,284
	<u>13,900,266</u>	<u>11,958,184</u>
Less accumulated depreciation	<u>(5,694,645)</u>	<u>(4,380,013)</u>
	<u>\$ 8,205,621</u>	<u>\$ 7,578,171</u>

Depreciation expense totaled \$1,314,632 and \$1,126,159 for the years ended June 30, 2020 and 2019, respectively.

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. The buildout was placed in service during the year ended June 30, 2020.

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 \$262,768 and \$257,616 for the years ended June 30, 2020 and 2019, respectively.

As of June 30, 2020, future minimum operating lease payments required are as follows:

<u>Year Ending June 30,</u>	
2021	\$ 268,022

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

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%. Amounts outstanding under the agreement totaled \$100,000 at June 30, 2018. 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%. Amounts outstanding under the agreement totaled \$100,000 at June 30, 2018. 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. Amounts outstanding under this note totaled \$5,695,962 and \$5,858,578 at June 30, 2020 and 2019, respectively. Additionally, the agreement contains restrictive covenants that are tested annually on June 30. At June 30, 2020, management believes the Organization was in compliance with the other covenants.

Future principal payments on the notes are as follows at June 30, 2020:

Years Ending June 30,

2021	\$ 158,002
2022	164,947
2023	<u>5,373,013</u>
	<u>\$ 5,695,962</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 2021 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, 2020 and 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. Total federal awards received during the years ended June 30 2020 and 2019 totaled \$2,886,114 and \$2,990,447, respectively.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

Note 8—Concentrations

For the years ended June 30, 2020 and 2019, the Organization received \$29,190,456 (86%) and \$26,966,899 (85%), 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 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 ("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 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.

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, 2020, to the Teacher Legacy Pension Plan were \$213,306 which is 9.60% 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 THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

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 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 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, 2020, to the Teacher Retirement Plan were \$225,287 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 THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2020 AND 2019

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 \$1,116,608 and \$986,769 for the years ended June 30, 2020 and 2019, 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.

O: Most recent internal financial statements

Lead Public Schools
 Income Statement_Network
 As of September 30, 2022
 As of Date:

09/30/2022

	Year To Date 09/30/2022
	<u>Actual YTD</u>
Revenue	
BEP	7,219,620
Federal Grants	2,116,900
Philanthropy	509,634
Other Misc Revenue	11,057
Authorizer Fee	<u>(61,221)</u>
Total Revenue	<u><u>9,795,990</u></u>
Expenses	
Personnel Expenses	7,019,678
Instructional	521,014
Student Support	52,273
School Operations	449,226
Transportation	662,699
Facilities Expense	815,142
G & A	<u>777,852</u>
Total Expenses	<u><u>10,297,884</u></u>
EBITDA	<u><u>(501,894)</u></u>
Depreciation	233,576
Interest Income/Expense	26,717
Net Income	<u><u>(762,187)</u></u>

O: Most recent internal financial statements

**Lead Public Schools
Balance Sheet Detail Trend**

As of September 30, 2022

(Unaudited - For Management Purposes Only)

As of Date:

09/30/2022

Month Ending
09/30/2022

Actual

Assets

Current Assets	20,733,086
Other Long Term Assets	100,155
Fixed Assets	14,880,563
Accumulated Depreciation	(6,750,354)

Total Assets 28,963,450

Liabilities and Equity

Liabilities	1,571,118
Equity	
Net Assets	28,103,599
Net Profit and Loss	(711,267)
Total Equity	<u>27,392,332</u>

Total Liabilities and Equity 28,963,450

Q: 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 9th graders, of which 4,000 or 65% were low-income.
- Last year the number of low-income students scoring ≥ 21 on the ACT was less than 400.
- Thus, the likelihood of a low income 9th 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. 9th 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 21st 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 21st 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 (5th - 8th) 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 5th - 8th 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 9th 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, student 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, student 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 awake 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 9th 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 8th 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 9th-11th 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 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 25th 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
Grade 5	140	140	140	140	140	140	140	140
Grade 6		140	140	140	140	140	140	140
Grade 7			140	140	140	140	140	140
Grade 8				140	140	140	140	140
Grade 9					125	125	125	125
Grade 10						110	110	110
Grade 11							105	105
Grade 12								100
Total	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.

Parent Information Sessions	These information meetings were held at the feeder elementary schools to inform parents of the change at Cameron the next year
Church information sessions	These information meetings were held at area churches, usually during a Sunday morning service to give information to potential parents
Door-to-door recruiting	This outreach consisted of going door-to-door throughout the Cameron zone, talking with parents and students about their options and choices
Open Houses	These were opportunities for parents to come and see both LEAD campuses and visit Cameron to learn more about how we “do school.”
Council and Neighborhood meetings	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
School Meetings	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
Community events	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
Media (radio)	This effort was aimed at radio outlets in both the African-American and Latino communities
Advertising	This outreach was done using both direct mail pieces and posters set up in area businesses and community centers
Phone Calls	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 4th 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 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 5th 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 5th-12th 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
Enrollment	<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 >90% for both 9th grade and 10th 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 20th count day.</p>	<p>Exit data</p> <p>Chancery system</p> <p>Enrollment dashboard</p>
Student Performance	<p>We will maintain and improve the academic performance of our students as measured by EOC, attendance, GPAs, and suspension data.</p>	<p>9th and 10th grade EOC scores exceed the scores of every MNPS school with >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.

Function	Network/Management Organization Decision-Making	School Decision-Making
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.

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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 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
Total 5-12 schools	3	4	5	5	5
Student enrollment	1030	1785	2385	3055	3506
Management Organization Positions					
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
Executive Mgt.	3	4	4	4	4
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
Academic Dept.	4	6	6	7	8
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
External Affairs, Dev., & Outreach	4	5	6	6	6
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
Finance, Accounting, & Budget		1	3	3	3
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
Operations Dept.	3	7	8	8	8
Total Central Office FTEs	14	23	27	28	29
LEAD Public Schools Staff (5-12)					
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
Total FTEs at all LEAD Public Schools	120	195	251	311	353
Total network FTEs	134	218	278	339	382

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
Total School FTEs	18	30	45	58	71	80

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 30th 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
		Number of Hours		
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
Total		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 5th 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 5th and 6th 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 5th and 6th 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. 1st 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 97th percentile in the state, and in Biology I it was 16.9, placing it also in the 97th 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 5th -12th 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 7th 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 5th and 8th grades. Adding the Writing classes to the 6th and 7th 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.



Tennessee Achievement School District Charter Agreement

This Charter Agreement (Agreement) is entered into by and between the Achievement School District (ASD) and **Neely's Bend College Prep, Nonprofit LLC**, a Tennessee nonprofit limited liability company (Operator). This Agreement may be assigned by the Operator to a wholly-owned Tennessee nonprofit limited liability company. This Agreement is subject 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.¹

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.² The ASD may contract directly with individuals or non-profit corporations to manage schools, or authorize 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.

Charter School Management Organization (CMO) – A non-profit entity that operates multiple charter schools at least one (1) of which is in Tennessee.

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 Agreement, 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 CMO; 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.”

1. **Grant of Charter**

The ASD hereby grants a charter to the Operator for the management of **Neely's Bend College Prep** for ten (10) consecutive school years, beginning with the 2015-16 school year. In accordance with the terms of the Operator's Application, the Operator will operate the 5th grade during the 2015-16 academic year, and add one (1) grade each year thereafter, until the academic year **2018-19** at which time the charter school will consist of grades 5-8. The Operator may add high school grades (9-12), beginning with the 9th grade in SY 2019-2020 and add one additional grade per year until SY

¹ Pursuant to Tennessee TCA § 49-13-104. All Tennessee laws may be accessed online at <http://www.lexisnexis.com/hotttopics/tncode/>.

² Pursuant to Tennessee §§ 49-1-602, 614.



2022-23, space permitted. The Operator is expected to serve ASD-eligible students who are zoned to attend **Neely's Bend College Prep** in the applicable grades for which there is zoned attendance in any given year, up to the maximum number identified in the Operator's ASD application and subject to Section 3.3 of the Agreement below. 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 this Agreement and the school shall remain under the authority of the ASD. The 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 4**).

Upon expiration of this Agreement, or sooner, provided the conditions for transfer set forth in state law are met, the school shall return to the LEA that operated the school prior to its inclusion in the ASD, subject to the applicable state statutes³. 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 law⁴.

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 (30th) day of June following the tenth (10th) 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 semi-annual performance reviews, which include desktop and scheduled on-site reviews of accountability and federal grant management, student access and equity compliance, and operations. 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 five days' notice of any site visit and will allow a minimum of five 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 law⁵.

The Operator shall be the first avenue for response in case of any grievances filed against the charter school or its employees, pursuant to the ASD's Parent and Community Grievance Resolution Policy

³ T.C.A. § 49-1-614 [link]

⁴ T.C.A. § 49-13-121

⁵ T.C.A. § 49-13-122



in its Student Handbook ([Exhibit 5](#)) and the Operator’s parent and community complaint procedure. 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 4](#)) attached to this Agreement.

3. General Terms and Conditions of the Charter Agreement

3.1 The Application

The Application in response to the Request for Proposal (Application), submitted September 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 unless approved in writing by the ASD.

To the extent there is a conflict between the terms of this Agreement and the Application, the terms of this Agreement shall govern.

Material changes to the Application must be reviewed by the ASD prior to implementation. The ASD agrees to provide a written response to the Operator within fourteen (14) calendar days. 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



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- a. 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. Beginning with distributions in the 2015-16 school year, the ASD, as an authorizer fee, will withhold an aggregate of \$200 per pupil per year from the BEP funds distributed to the Operator. One-tenth of that amount (\$20) per pupil will be withheld from each of the ten BEP distributions noted in Section 3.2.1, based on the school's ADM in TDOE's EIS on the business day closest to the 6th day of each month in which payments are distributed. The ASD will, by December 1 of each year, provide an itemized accounting of its revenue and expenses, including the allocation of the authorizer fee. The ASD will not increase the authorizer fee more often than once every two years.
- b. 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 school, as amended and submitted to the Office of Portfolio Management for initial budgeting purposes no later than April 15 of each year. Initial payments will be based on this anticipated enrollment, which must be agreed upon by the ASD and the Operator and reflected in the Operator's Board-approved budget for the upcoming fiscal year by June 1 each year. The Charter School's state and local funds will be allocated based on the current year's Average Daily Membership (ADM) as reported in TDOE's EIS System as of October 1, and consistent with TCA 49-3-351.
- c. Funding Timing. The ASD shall allocate and distribute one-tenth of state and local funds to the Operator by the 15th of the month in August, September, October, November, December, January, February, March, April, and the 30th of June. Each state and local payment from October through April and the final payment in June is calculated based on the School's ADM in TDOE's EIS, as reported by the Operator on the business day closest to the 6th day of each month. 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.
- d. Use of Funds. With the exception of any management fee paid to the charter school's CMO, all BEP funds distributed to the Operator shall be used for the School authorized under this Agreement subject to the terms and conditions of section 3.2.3(f) below. 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. ⁶ 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 7 days of the ASD receiving funds from the State.
- 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 (TN COA). The Operator will have the option of initially recording transactions using their National Chart of Accounts and then posting summary transactions using the TN COA. The Operator shall record all 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 audit⁷. The audit shall be furnished to the ASD's Chief Financial Officer, the Commissioner of Education, and the Comptroller of the Treasury, as approved by the Operator's governing board by December 31 of each year. In addition, the Operator shall transmit the final trial balance to the ASD using

⁶ 34 C.F.R. § 80.21.

⁷ Conducted in accordance with TN 49-13-111(m) and 49-13-127(c).



the Tennessee Uniform Chart of Accounts with the submission of the annual independent financial audit. The Operator will pay for the 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 15 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 specifically prohibits a charter school operator from contracting with for-profit entities for the management or operation of the school⁸. Beyond that requirement, 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 local or out-of-state 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 a description of fees paid to charter, education management, or related non-profit organizations, showing the name of the organization, amount of fees paid, and the purpose for which the fees were paid.
- 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 final annual budget for the upcoming fiscal year by no later than June 1.
- 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 and functional codes, including grant codes using templates provided by the ASD as mandated by the TDE.

⁸ T.C.A. § 49-13-124(a)(1)



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- 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 funded through the ASD and 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.
- l. Insurance. Directors & Officers insurance and professional liability insurance for combined single-limit coverage of not less than \$5,000,000.00 per occurrence. Crime exposures to be covered include:
 1. Employee theft
 2. Money and securities while on premises or in transit
 3. Forgery
 4. Funds transfer fraud
 5. Computer fraud
 6. Money order and counterfeit currency fraud
 7. Credit card fraud
 8. Optional client coverage
 9. Coverage for investigative costs for covered losses
- ii. Such other insurance on the Premises in such amounts and against such other insurable hazards which at the time are commonly obtained in the case of property similar to the Premises.
- iii. In addition to the foregoing insurance, charter or contract operators shall maintain a fidelity or surety bond to cover all of the operator's employees that handle, process, or otherwise have responsibility for school funds, supplies, equipment, or other assets in amounts of not less than \$50,000.00 per occurrences.

3.2.4 Financial Performance Requirements



- a. Annual Audit
 - i. The annual audit will be submitted to the ASD by no later than 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 Operator's 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.
- b. Financial Indicators
 - i. A prior year operating deficit by the Operator will result in a potential review and explanation from the Operator's board.
 - ii. End of year Operator current ratio of less than 1.1 will result in an automatic review and explanation from the charter school board.
 - iii. Average end of year Operator 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.
- c. Compliance Items
 - i. Reporting should be consistent with agreed timelines for the annual report/audit, the annual budget and the annual financial report (AFR).
 - ii. Quarterly financial statement submissions should be received by the ASD within the agreed timeframe.
 - iii. Revenue reimbursement reports for non-BEP funds should be submitted at least quarterly and no more frequently than monthly.
 - iv. Operator's Board of Director/Trustees must sign and submit a signed conflict of interest form annually.
 - v. 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.
 - vi. The annual audit will be presented, reviewed and approved at a board meeting.

3.3 Student Population and Enrollment

- a. The Operator may only serve eligible students, as defined by T.C.A. §§ 49-1-614, and § 49-13-106. The Operator is required to serve all students zoned to its school, up to the building's program capacity (85% of the building capacity) or 130% of the prior year's average daily membership (ADM), whichever is smaller. For schools phasing in grades, this shall be scaled based on grades served in a particular year, compared to the grades served by the LEA in the school's last year of operation prior to placement in the ASD. In SY 2015-16 only, the Operator may restrict enrollment of zoned students up to the program capacity the Operator defined in its approved Charter Application and enrollment projections approved by the CFO as the basis for 2015-16 ASD budgeting by May 1, 2015.



- b. If space exists after planned enrollment of zoned students, students zoned to attend other ASD-eligible schools in Nashville/Davidson County may enroll or be included in an enrollment lottery, pursuant to T.C.A. § 49-13-113, as reflected in [\(Exhibit 5\)](#).
- c. Once the school is at enrollment capacity, students who are zoned to attend the school shall be reassigned to a different ASD school where space is available. 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 intra-district transfer policies.

3.4 Special Education

3.4.1 Authorities. Special education services, related services, and accommodations for students who are eligible under the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973 (Section 504), the Americans with Disabilities Act (ADA), or any applicable provisions of State law, shall be provided in accordance with applicable State and federal law and this Agreement. The ASD is the local education agency (LEA) responsible for ensuring compliance with the Individuals with Disabilities Education Act (IDEA) and State special education law and regulations.

3.4.2 Roles and Responsibilities of the Parties.

a. The Operator assumes responsibility for the identification of students in need of special education services, provision of services, development and implementation of individualized education programs (IEPs), etc. for students identified as eligible for special education services. The Operator shall have a qualified special education coordinator who will be responsible for monitoring individual case management of all special education students and for arranging the provision of services required by their IEP. The Operator shall maintain a file documenting Operator's compliance with special education requirements.

b. As the LEA, the ASD retains the authority to oversee and require that the Operator take corrective measures with regard to special education. The Operator is responsible for the management of its special education budgets, personnel, programs and services. The ASD reserves the right to audit the use of special education funds provided to the Operator to ensure compliance with program and fiscal requirements.

c. The Operator shall ensure that its special education personnel or contracted personnel are appropriately credentialed and licensed consistent with federal requirements and State laws and regulations. The Operator shall implement the programs and services, including providing related services, required by the IEPs of the students enrolled at the School(s). The Operator shall rely on its discretion to determine whether or not to contract with outside entities, such as consultants or local districts, for the provision of any mandated



special education or related services. Upon request by the ASD, the Operator shall provide all requested or appropriate documentation to demonstrate the licensure status of School personnel providing special education or related services and of independent contractors providing special education or related services, and, the training received by said personnel, and the steps taken by the Operator to comply with applicable credentialing the requirements. The Operator shall promptly provide the ASD with documentation that updates this information during the course of the school year to the extent that it has changes in its personnel, independent contractors, or training for staff.

d. The Operator shall promptly report to the ASD any and all alleged serious infractions, filed due process complaints, and other significant non-compliance issues relating to special education.

e. The School will meet the needs of the students who enroll. In the rare instance that the Operator believes itself unable to provide an appropriate placement or services for a student with special needs, the Operator shall contact the ASD to discuss placement and service alternatives. The IEP team convened at the school shall have the authority to make offers of a FAPE and decisions regarding the staffing and methodology used to provide special education and related services at the school pursuant to an IEP.

f. To the extent that the ASD provides training opportunities and/or information regarding special education to the staff of other operators, such opportunities and/or information shall be made available to Operator's staff. To the extent that the ASD elects to offer to the Operator administrative and/or programmatic services relating to special education, the Operator may avail itself of such services at a previously agreed upon fee.

g. The Operator shall indemnify the ASD for any costs, attorney fees, and/or financial penalties imposed on the ASD by state and/or federal authorities arising out of actions or omissions of the Operator relating to special education.

3.4.3. Costs for Special Education. All costs associated with providing educational services to enrolled students with disabilities are the responsibility of the Operator. Part of the Basic Education Program (BEP) funds are generated based on special education needs of the ASD during the prior year. The ASD will make IDEA Part B funds available to schools for direct reimbursement, in accordance with ASD policy.

3.5 Facility

The charter school shall be located at **1251 Neely's Bend Road, Madison, TN 37115**. 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. If a Memorandum of Understanding (MOU) is in effect between the ASD and the LEA that owns the facility (**Exhibit 2**), the terms of such MOU shall govern facility use by the Operator.

3.6 Transportation

Subject to the terms of the Memorandum of Understanding, 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).

3.7 Assessment

- a. The Operator shall have the autonomy to devise its own student assessment programs, beyond the following requirements:
 - i. Administer all TDOE-required student assessments, including but not limited to TNReady, TCAP, End of Course Assessments, ACT, and ELL Assessments for the required grades and testing windows.
 - ii. Administer ASD-required student assessments, as defined by district policy.
- b. The Operator shall comply with all TDOE- and ASD- required assessment administration, security and reporting requirements.

3.8 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 obligations to comply with all federal, state and local laws applicable to the provision of public education in a charter school in the ASD. Further assurances are provided in the Application. The Operator acknowledges that the waiver of education statutes and rules of the state board or department of education, granted pursuant to Rule 0520-14-03 does not include a waiver of any of the regulatory or statutory requirements listed in T.C.A. § 49-13-105(b) or any of the Tennessee Public Charter School Act, T.C.A. § 49-13-101 et seq.
- b. its state and federal grant obligations and that it will comply with all grant assurances to which the Operator has agreed..
- c. State, Federal and ASD compliance reporting requirements, as reflected in (**Exhibit 3**).

3.9 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 may trigger review and may result in revocation of the charter. Prior to revocation, the ASD shall notify the Operator and give reasonable opportunity to cure the violation, unless the ASD determines, in writing, that the violation constitutes a severe and imminent threat to the health or safety of the students.
- b. Tennessee Department of Education (TDOE) and ASD Achievement
 - i. The ASD will complete an annual threshold test of all schools to determine their fulfillment of the ASD's academic performance targets
 - ii. Schools must meet or approach ASD school accountability goals to remain authorized by the Operator.
 - iii. New schools in their first year of operation in the ASD are not held accountable to the TDOE's or ASD's school accountability system.
 - iv. In the event that the Operator's school fails to meet or approach ASD 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.
 - c. ASD School Performance Framework
 - i. The ASD School Performance Framework (**Exhibit 4**) establishes school performance indicators with targets that are equal to or exceed TDOE performance targets.
 - ii. The ASD will publicly report annually schools' performance according to the ASD School Performance Framework on School Report Cards. Operators shall make available data required to report achievement and progress, according to the ASD School Performance Framework.
 - d. ASD School Performance Composite Score
 - i. The ASD School Performance Framework includes a subset of metrics that combine to create a Composite Score (**Exhibit 4**) 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(s) to determine school action decisions, including the rate of replication or replacement of the Operator's schools in the ASD (**Exhibit 4**). The ASD's Superintendent is the final authority on ASD school action decisions.



3.10 Hold Harmless

Hold Harmless. The Operator agrees to indemnify and hold harmless the State of Tennessee and, subject to the MOU, 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 ASD shall promptly defend, indemnify, and hold harmless the Operator, its officers, directors, employees, agents, representatives, volunteers, administrators, successors, and assignees from and against any and all alleged or actual breach of any obligations of the ASD under this Agreement, or any other actual or alleged breaches of any duty or obligation owed to the Charter School, the Operator, or any third party, arising from the ASD’s negligence, or any obligation imposed on the ASD, the Charter School, the Operator, or any third party, by Federal or state law concerning the operation and maintenance of any building in which the school is located, including but not limited to, the Americans with Disabilities Act of 1990, or any private claim based thereon.

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.

3.11 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.

3.12 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:

- a. Application in response to Request for Proposal
- 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.



ACHIEVEMENT
SCHOOL DISTRICT

X *Chris Barbic*

Chris Barbic (May 21, 2015)

Chris Barbic

Superintendent, Achievement School District

X *Chris Reynolds*

Chris Reynolds (May 20, 2015)

Chris Reynolds

CEO, LEAD Public Schools

X *Dwayne Tucker*

Dwayne Tucker (May 19, 2015)

Dwayne Tucker

Board Chair, LEAD Public Schools



ACHIEVEMENT
SCHOOL DISTRICT

Exhibit 1 – Operator Application in response to Request for Proposal

Exhibit 2 – ASD-LEA Memorandum of Understanding (if applicable)

Exhibit 3 – ASD List of State and Federal Compliance Reports

Exhibit 4 – ASD School Performance Framework

Exhibit 5– ASD Student Handbook



Fwd: Neely's Bend

Dwayne Tucker <dwayne.tucker@leadpublicschools.org>
To: Adrienne Useted <adrienne.useted@leadpublicschools.org>

Thu, Nov 3, 2022 at 11:47 AM

----- Forwarded message -----

From: **Robin Copp** <Robin.Copp@tn.gov>
Date: Mon, Oct 10, 2022 at 7:10 AM
Subject: Neely's Bend
To: Dwayne.tucker@leadpublicschools.org <dwayne.tucker@leadpublicschools.org>
Cc: Adrienne Alford <Adrienne.Alford@tn.gov>

Good Morning, Dwayne,

This email is a follow up to our recent discussion regarding upcoming authorizing options for Neely's Bend. As we discussed, T.C.A § 49-1-614 states, If, at any time, an ASD-authorized charter school meets the priority exit criteria set forth in the state's accountability model, then the school may apply to the LEA or the commission for a new charter agreement with a term not to exceed the term of the initial ASD charter agreement.

Since Neely's Bend met the priority exit criteria, the options that are available consist of the following:

- Remain in the ASD
- Apply to the Tennessee Public Charter School Commission
- Apply to Metro Nashville Public Schools

ASD will continue to provide the resources needed to help you make an informed decision in planning for the best course of action for your school community. Please do not hesitate to reach out to me or Adrienne Alford if you have questions or need assistance.

Best,

Robin



Robin Copp | Assistant Commissioner

Division of School Turnaround

Interim State Turnaround Superintendent

615-892-0042