



Department of Education

Facilities and Operations

Charter Operator Toolkit | June 2026



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Facilities Requirements and Planning

Finding and securing the right facility is one of the most crucial and difficult steps to open a school because it impacts all operational aspects of the school, such as finance, operations, compliance, and academic program quality. It drives everything from staffing plans to recruitment timelines to overall readiness. It also plays a major role in student enrollment and community interest. An early decision helps to create momentum for student recruitment, family engagement, and staff hiring.

Charter school leaders should approach facility planning as a pre-opening year priority. Failure to secure a facility is the most common reason that charter schools fail to open on time. Any delay in securing a facility creates downstream delays across the entire launch plan and can result in a delay in opening pursuant to [T.C.A. § 49-13-136\(f\)](#), which requires that a physical location be secured at least 60 days prior to opening. According to [T.C.A. § 49-13-110\(b\)](#), charter schools are allowed to delay opening for one (1) academic year; however, if the public charter school requires a delay of more than one (1) year, then the school must obtain approval of the delay from the school's authorizer.

The facility search should be a collaborative effort. Involvement of the board, partners, funders, and the authorizer can shape the speed and outcome of the search. The [Facilities Pre-Opening Checklist](#) provides a guide to assist with navigating this complex task.

Key Points

- Start with both short-term and long-term needs: A facility must meet Year 1 requirements and still align with the school's growth plan. Be clear about immediate needs, future capacity, and acceptable trade-offs before the search begins.
- Build a facilities subcommittee early: A board subcommittee with real estate, construction, finance, and legal expertise strengthens due diligence, site reviews, deal structure, and negotiations.
- Create a clear list of must-haves and nice-to-haves: Leadership defines essential requirements such as classroom count, traffic flow, specialized instructional areas, expansion potential, outdoor space, and security features. This list keeps the search focused on program needs.
- Use multiple search channels: A strong search effort uses more than one broker or property type. Leadership explores commercial brokers, community organizations, unused public buildings, local partners, mission-aligned developers, and real-estate nonprofits.
- Budget for the full cost of occupancy; A facility budget accounts for more than rent. Leadership includes renovation costs, utilities, technology, furniture, permitting,

inspections, insurance, maintenance, and security. Schools often underestimate these costs without a full review.

- Sequence the timeline backward from day one: Permits, design decisions, renovation steps, inspections, the certificate of occupancy, and setup require more time than expected. Leadership sets the timeline by starting with the first day of school and planning backward.

Best Practices in Facilities Planning

Focus Areas	Best Practices
Define Financial Guardrails Early	Set financial guardrails before reviewing properties. Clear limits prevent facility commitments that create financial strain or force reductions in core services.
Use a Complete Financial Model	Build a Year 1 operating budget. This budget establishes the school's initial affordability range. Leaders should complete a multi-year financial projection. Long-term projections show whether the facility remains sustainable as enrollment and staffing shift. Leaders should create a facilities pro forma under more than one enrollment scenario. Different scenarios reveal how enrollment changes alter revenue and overall affordability.
Set an Affordability Range	Identify a maximum affordable rent or debt service. A defined ceiling protects the school from financial pressure that undermines program stability.
Evaluate Enrollment Uncertainty	Examine early enrollment demand. Enrollment drives revenue, and unclear demand increases the risk of selecting a facility that is too large or too costly.
Make Informed Facility Choices	Choose properties that fit the school's affordability range. A suitable property avoids long-term strain on the budget and prevents forced program cuts.
Protect Program and Staffing Plans	Confirm that each facility supports the academic program and staffing plan. A facility that does not match program needs disrupts operations and reduces instructional quality.

Facilities Requirements

Tennessee State Board of Education Rule [0520-01-04-.01](#) outlines the requirements that all public schools, including public charter schools, must meet to remain in compliance with state laws.

Focus Areas	Requirements
Building Codes and Zoning Permits	<ul style="list-style-type: none"> • Must meet all local and state building codes for structural, mechanical, electrical, plumbing, and life-safety standards. • Must comply with land use rules, school occupancy classifications, and required local permits.
Fire Marshal Approval	<ul style="list-style-type: none"> • Must pass at least one fire safety inspection each year. • Must keep all inspection reports, note any areas of non-compliance, and record the corrective actions taken.
Health and Sanitation	<ul style="list-style-type: none"> • Must meet health and sanitation standards, including restroom access, safe water systems, and food-service requirements where applicable.
ADA Accessibility	<ul style="list-style-type: none"> • Must provide ADA-compliant entrances, restrooms, parking, and interior routes for students, staff, and visitors. ADA requirements apply to all public schools and are outlined in 28 C.F.R. Part 35
Certificate of Occupancy	<ul style="list-style-type: none"> • Must obtain a certificate of occupancy and from the overseeing local building department before students and staff can enter the building.
Insurance Coverage	<ul style="list-style-type: none"> • Must carry property, liability, and workers' compensation insurance at levels required by the school's governing board and required by the charter agreement.
Notice of Facility Changes	<ul style="list-style-type: none"> • Must notify and receive approval from the authorizer before any major change in location or facility use that is not stated in the charter agreement.

Required Signage and Notices

There are several types of signage and notices that all Tennessee schools are legally required to display in certain locations or to post on the website. These requirements come from a mixture of federal law, state law, and SBE rule or policy and are listed in the following documents:

- [Required Signage for Tennessee Public School Campuses - Issued November 2024.](#)
- [Required for Tennessee Local Education Agency Websites - Revised December 2024](#)

Authorizer policies may establish additional required signage and notices, and department guidance tied to safety, communication, special education, and operational compliance can indicate required or recommended signage and notices.

Key Points

- Getting signage right early helps schools avoid common compliance findings and ensures that families, visitors, and staff clearly understand their rights and responsibilities.
- Requirements apply when the school opens its doors, including temporary spaces during walk-throughs prior to students entering.
- Authorizers and the department often review signage during pre-opening visits, monitoring, and safety audits.

Pre-Opening Year Planning

- Build a Signage Checklist as part of the startup facilities plan (front office, main entrance, nurse's office, website, classrooms).
- Assign a single owner (e.g., Operations Manager) responsible for collecting templates, printing, displaying, and annually updating required signage.
- Check whether the authorizer already has standard templates aligned to Tennessee rules.
- Plan for dual posting. Many notices must appear both physically on site and on the school's website.
- Conduct mock walk-throughs before opening to confirm that everything required is posted and accessible.

On-going Compliance

- Review signage at least twice a year during back-to-school setup and mid-year to ensure postings are current, visible, and legible.
- Monitor regulatory changes from the department, the State Board, and the authorizer to update any required language.
- Track personnel shifts so required postings always reflect the correct names, titles, and contact.

Operations and Procedures

Operations and procedures form the backbone of how a charter school functions day to day. They are the systems that keep students safe, staff supported, and families confident in the school's ability to operate consistently and responsibly. While this work often shows up as documentation and procedures, its purpose is much broader. **Strong operations and procedures create conditions that allow academic programs, culture, and community to thrive.**

Many operational challenges that arise in a school's first year are not caused by lack of effort, but by decisions that were not made early enough. Choices about enrollment, staffing, facilities, student services, and safety are deeply interconnected. When these decisions are delayed or made in isolation, schools are often forced into reactive problem-solving once the year begins.

Thoughtful planning reduces risk, supports staff clarity, and minimizes disruptions that can affect students and families. **Investing time upfront in operations and procedures helps schools move from startup mode into stable, sustainable practice more quickly.**

Every detail does not have to be finalized all at once. Use this chapter to pace the work and return to specific sections as decisions are made and systems are built. The goal is clarity, readiness, and the ability to launch with confidence and care.

Through all the operational areas covered in this chapter, it may be helpful to approach each topic with three guiding lenses in mind:

- **Early decisions** - What choices need to be made early because they shape staffing, facilities, budgets, or compliance obligations?
- **Systems over tasks** - What routines, ownership, and processes will allow this area to function consistently over time?
- **Alignment and accountability** - How does this work align with the approved charter, authorizer expectations, and commitments to families?

Some areas of operation are so complex that whole chapters have been devoted to them (e.g., staffing, finance, academic, etc.). This section will focus on the eight operational areas that fall under the umbrella of Coordinated School Health.

Coordinated School Health

Coordinated School Health, as outlined in [Tenn. Code Ann. § 49-1-1003](#) and [State Board of Education \(SBE\) Policy 4.204](#), improves student health and the capacity to learn through the support of families, communities, and schools. Coordinated School Health connects physical, emotional, and social health with education through eight interrelated components: health education, health services, healthy school environment, nutrition, physical education and physical activity, school counseling, psychological & social services, student, family, and community involvement, and staff wellness.



Each component addresses a distinct aspect of student and staff wellness, from physical education and health services to mental health, family engagement, and school nutrition. When implemented in a coordinated manner, these elements create a comprehensive system of support that promotes student well-being and helps schools align health efforts with academic goals. Understanding how each component contributes to student success is essential for building effective strategies and ensuring that no area of school health is overlooked.

The department's [Division of Coordinated School Health](#) provides schools with guidance, resources, and best practices to support student wellness and healthy learning environments.

Health Education

School-based health education helps students acquire functional health knowledge, strengthen attitudes and beliefs, and provide an opportunity for practicing skills needed to adopt and maintain healthy behaviors throughout their lives. Research shows a strong connection between healthy behaviors and academic achievement (e.g., grades, standardized tests, graduation rates, attendance). Student behaviors and experiences set the stage for adult health. In particular, health behaviors and experiences related to violence and substance use are consistently linked to poor grades and test scores and lower educational attainment. In turn, providing health education can help youth develop positive well-being, academic success, and healthy outcomes into adulthood. The State Board of Education (SBE) adopts the [academic standards](#) and graduation requirements for subjects in grades K-12. The current criteria state that **all students must successfully pass one high school credit of Lifetime Wellness** in order to graduate with a traditional high school diploma.

Lifetime Wellness is a holistic approach to health and physical education in Tennessee high schools. The course addresses Nutrition, Substance Use and Abuse, Mental Health, Human Growth and Development, First Aid and Safety, and Personal Fitness and Related Skills. Each content area is addressed in a classroom setting while allowing opportunity to explore how one

content area affects and is affected by other content areas. Instruction emphasizes prevention as well as intervention with regard to the health practices of students.

General Recommendations

- Schools should be aware of state laws and regulations related to health education instructional requirements and restrictions, including but not limited to [family life](#) and firearms safety instruction.
- Review official lists of textbooks and instructional materials for approved publications available for local adoption in Lifetime Wellness.
- Consider adopting a standards-based health curriculum, which may or may not be supplemented with public health partners from the community.

Health Services

The [Guidelines for Healthcare in a School Setting](#) guide the implementation and development of a successful school health services program, but schools remain responsible for understanding federal and state laws and regulations as they relate to providing school health services and understanding Tennessee nursing laws, rules, and regulations as they relate to Tennessee nursing practice. The [School Health Pre-Opening Checklist](#) provides steps and practices for the development of this important operation.

General Recommendations

- Schools should review resources available on the department's [Coordinated School Health, Health Services website](#) for programmatic guidance.
- Schools should develop health services policies, protocols, and procedures to meet the diverse healthcare needs of students, including management of chronic health conditions, acute illnesses, emergency care and minor first aid.
- Schools should be aware of federal and state laws and regulations related to school health services, including but not limited to, Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973, Americans with Disabilities Act (ADA), Occupational Safety and Health Administration (OSHA), Family Educational Rights and Privacy Act (FERPA), and Health Insurance Portability and Accountability Act (HIPAA).
- Schools should employ or contract a licensed nurse to perform healthcare procedures for students including administration of medications during the school day or at related events. School staff may assist students with self-administration of medication and administration of rescue medications in accordance with state law and local policy.
- Schools with school nurses are encouraged to collaborate with other schools with charter school nurses to identify best practices.

Healthy School Environment

School Safety

School safety touches every part of the program, from facilities, staffing, student culture, daily routines, communication, and emergency preparedness. This work consists of not only compliance requirements but also real, immediate risks to students, teachers, staff, and anyone who enters the building. Getting school safety right is foundational to building a safe, trusting, and effective learning environment.

Safety begins long before an emergency occurs. It starts with strong planning, intentional preparation, and clear operational systems that allow the team to prevent, respond to, and recover from incidents. A well-designed school cannot function without strong functional procedures, trained staff and students, and practiced drills.

Two important department resources to guide planning, define required roles, and help build the systems needed to keep the school community safe.

- [School Safety Planning Guidance for New Public Charter Schools](#)
- [School Safety Coordinator Manual](#)

Discipline is the system a school uses to define expectations, respond to behavior, and maintain a safe and supportive learning environment. Effective discipline balances accountability with support, protects student rights, and minimizes unnecessary loss of instructional time.

Detailed requirements and policy language regarding discipline can be found in:

- [Tennessee School Discipline Laws and Regulations \(Discipline Compendium\)](#)
- [Tennessee Public Charter School Commission Student Discipline Policy 6313](#)

School climate reflects whether students feel academically challenged, physically and emotionally safe, and valued and connected to their school. Because climate is shaped by adult practices, expectations, and systems, improvement efforts focus on comprehensive changes in norms, interactions, and procedures rather than on any single program or intervention. The department's Division of Coordinated School Health administers the [Tennessee School Climate Measurement System](#), which collects perception data from students, teachers, and families. These surveys measure school engagement, safety, and environment and are designed to support school improvement and decision making.

Additional resources may be found on the department's [Coordinated School Health, School Safety and Transportation website](#).

School Safety Plan and EOP

- Who are the stakeholders that need to be a part of the school safety team and included in the Emergency Operations Plan planning process?
- What decisions must be made in Year 0 that affect our safety model (drills, communication, facility layout)?

Leadership, Teams & Training

- Who will serve as the School Safety Coordinator, and do they understand their roles and responsibilities?
- What plan of action will be taken to ensure that we adequately train staff and implement safety procedures consistently?

Facilities, Systems & Daily Operations

- Have we conducted a School Security Assessment in collaboration with Homeland Security to determine if our campus has potential vulnerabilities and what adjustments must be made before opening?
- What daily operational routines (arrival, dismissal, visitor access/management, student movement) must be designed with safety at the center?

Transportation

[T.C.A § 49-13-114](#) allows charter schools in Tennessee to decide whether they will provide student transportation as part of their program model, and this decision must align with the transportation plan submitted in their charter application. Schools are expected to operate in accordance with that plan; changes to the transportation model require a charter amendment. [T.C.A. §§ 6-2101-2119](#) and [SBE Rule 0520-01-05](#) set the general requirements for schools regarding transportation.

Regardless of the overall decision, schools must still plan intentionally for students whose IEPs require transportation and clearly communicate transportation expectations to families from the start.

<p>If a school provides transportation</p>	<ul style="list-style-type: none"> • It receives the same state and federal transportation funds the LEA would have received for those students. • It must meet all state transportation laws, including safety, driver qualifications, inspections, and appointing a transportation supervisor.
<p>If a school does NOT provide transportation</p>	<ul style="list-style-type: none"> • The school still must document how transportation will be addressed in its charter agreement and family communications. • It does not receive transportation funding from the LEA. • Families arrange their own transportation unless a student's IEP requires specialized transport.

Additional resources and guidance can be found on the [Coordinated School Health, School Safety and Transportation webpage](#). The [Student Transportation Pre-Opening Checklist](#) can support schools once their transportation model is set and they begin building out operational systems.

School Nutrition

Tennessee's School Nutrition program is responsible for providing nutritious meals and snacks for students in public and private schools, as well as residential and child care institutions. School Nutrition administers the United States Department of Agriculture's (USDA) National School Lunch Program, School Breakfast Program, and Afterschool Snack Program across the state. All public schools in Tennessee are on the [National School Lunch Program](#), which provides nutritionally balanced, low-cost or free lunches to children each school day

School nutrition works best when key decisions are made early and intentionally. These choices shape the operational complexity, cost structure, facility needs, and compliance responsibilities long before the first meal is served. The [School Nutrition Programs \(SNP\) Resource Hub](#) is designed to provide easy, online access to topics related to the National School Lunch Program (NSLP), School Breakfast Program (SBP), Afterschool Snack Program, Seamless Summer Program, and Fresh Fruit and Vegetable Program.

Federal school nutrition programs are a regulated space with ongoing responsibilities. Once enrolled, expectations apply consistently, regardless of whether meals are prepared on site, vended by a third party, or provided through a shared service arrangement. The following are some key points regarding school nutrition programs.

Key Points

- Program participation comes with ongoing obligations: Participation in the National School Lunch Program and School Breakfast Program requires annual agreements, routine reporting, monitoring, and readiness for audits or administrative reviews.
- Eligibility, counting, and claiming must be accurate: Schools are responsible for determining student eligibility, counting reimbursable meals correctly, and submitting accurate claims for reimbursement. Errors here can result in repayment or corrective action.
- Nutrition standards and meal requirements apply even when services are outsourced: Using a vendor does not transfer accountability. The school remains responsible for ensuring meals meet nutrition standards and program requirements.
- Civil rights and nondiscrimination requirements are central: Meal service must follow federal civil rights rules, including equal access, proper handling of complaints, and required public notices.
- Food safety and health requirements must be met: Schools must follow food safety standards, including inspections, staff training, and proper facilities, even if meals are delivered rather than cooked on site.
- Documentation matters: Most compliance issues arise from missing or incomplete documentation rather than intent. Clear systems and internal ownership of documentation and recordkeeping reduce risk significantly.
- Mandatory training(s) must be completed: For new School Food Authorities, certain trainings must be completed before the school can be approved to operate school nutrition programs and claim meals for reimbursement.

Planning for School Nutrition Program Implementation

1. Determine how meals will be provided.

All public schools must follow [T.C.A § 49-6-2302](#) and establish the National School Lunch and School Breakfast Programs. Decide which School Nutrition programs the school will participate in the National School Lunch Program and School Breakfast Program, and whether meals will be prepared on site, vended by a third party, or provided through a district or shared service model. Each option carries different implications for staffing, facilities, and oversight. To participate in the program, the school must become a School Food Authority (SFA). This requires following the process outlined on the department's [Coordinated School Health, School Nutrition website](#).

2. Determine who will be responsible for managing nutrition program oversight and compliance.

Even when services are outsourced, the school remains accountable for compliance. This means that, even if food service is outsourced, the school must still retain and maintain direct involvement in the operations and cannot delegate certain responsibilities. Identify who will oversee vendors, manage reporting requirements, and serve as the primary point of contact for nutrition-related issues.

3. Procuring a vendor for the food service program.

The first step is to reach out to the State Agency. The process of procuring a vendor involves many steps and can take six to eight months to complete.

The steps to complete the procurement process can be found on the department's [Coordinated School Health, School Nutrition website](#). The request for proposal (RFP) timeline for food service management company (FSMC) contracts allows schools to follow all the steps involved in procuring a food service vendor.

4. Fitting nutrition into the daily school schedule.

Meal timing affects instructional minutes, supervision plans, staffing schedules, and student flow through the building. Nutrition should be planned alongside scheduling, not layered on later.

5. Abilities and constraints of the facility to support school nutrition programs.

Confirm early whether the building can accommodate food storage, serving lines, refrigeration, handwashing stations, and health inspections. Facility constraints often drive nutrition model decisions more than budget alone.

6. Determine how school nutrition will be reflected in the budget.

Participation in federal programs brings reimbursement but also upfront costs and ongoing administrative work. Leaders should understand both sides of the financial equation when selecting a model.

Physical Education & Physical Activity

Physical education (PE) is an essential part of students' overall development and well-being. It is a structured, standards-based academic subject that follows a planned, sequential Pre-K-12 curriculum. Quality PE programs provide developmentally appropriate instruction across a wide range of movement and activity areas, including motor skills, fitness, rhythm and dance, cooperative games, and team and individual sports. These programs are designed to promote each student's physical, mental, emotional, and social growth while laying out the foundation for lifelong healthy habits. [T.C.A. § 49-6-1021](#) sets requirements for schools regarding physical activity.

Effective physical education goes beyond physical movement, it helps build students' self-confidence, teamwork, and decision-making skills while also reinforcing the importance of

regular physical activity. PE should be taught by qualified professionals who are certified or licensed and meet state endorsement requirements.

The State Board of Education (SBE) adopts the [academic standards](#) and graduation requirements for subjects in grades K-12. The current criteria state that **all students must successfully pass one-half (1/2) high school credit of physical education** in order to graduate with a traditional high school diploma.

Physical activity (PA) is any activity that provides movement and can be supervised by any adult. This includes but is not limited to recess, classroom physical activity, sensory paths, and walking breaks. Physical activity is appropriate to incorporate throughout the day, regardless of physical education scheduling. It can promote healthy brain/body regulation, positively influence mood and focus, increase memory retention, and prepare the brain to learn.

General Recommendations

- Schools should be aware of state laws and regulations related to both physical education and physical activity and the variances between the minimum requirements for grades K-12.
- Schools should establish a plan for safe and effective recess to allow for the most benefits for students, including but not limited to training for supervising adults, training for students, safety checks, activity zones, and enough play equipment for students to be engaged.
- Provide physical educators with regular professional development and quality instructional materials such as standards-based curriculum and developmentally appropriate equipment.

School Counseling, Psychological, and Social Services

School Counseling, psychological, and social services are provided to assess and improve the mental, emotional, and social wellbeing of every student. All students receive these services, including developmental classroom guidance activities and preventative educational programs, to enhance and promote academic, personal, and social growth. Students who may have special needs are served through the administration and interpretation of psychometric and psychoeducational tests, observational assessments, individual and group counseling sessions, crisis intervention for emergency mental health needs, family/home consultation, and/or referrals to outside community-based agencies when appropriate.

The professional skills of counselors, psychologists, and social workers, along with school health nurses, are utilized to provide coordinated wraparound services that contribute to the mental, emotional, and social wellbeing of students, their families, and the school environment.

Qualified professionals such as school counselors, school psychologists, school social workers, and school nurses, along with mental health professionals from community agencies, provide these services.

Mental health services are provided in compliance with all applicable federal and state laws, including IDEA, Section 504, FERPA, and mandatory reporting requirements, and are delivered by appropriately licensed professionals to ensure equitable access, confidentiality, and coordinated support through a multi-tiered system of services.

Schools should review resources available on the department's [Coordinated School Health, School Counseling, Psychological, & Social Services website](#) for programmatic guidance that includes:

- [Implementation of Comprehensive School Mental](#)
- [Comprehensive School Counseling Model and Standards](#)

Schools should develop policies, protocols, and procedures that address the diverse counseling and psychological needs of students, including but not limited to, trauma-informed awareness and discipline, suicide prevention, character education, conflict resolution, and social media and internet safety.

Staff Wellness

Teachers and other school employees are charged with educating and caring for one of our most precious assets – our students. Therefore, it is imperative that school employees are supported in their efforts to stay healthy and active so that they can do their job most effectively. Wellness opportunities such as health assessments, health education and physical fitness activities are provided to all school staff, including the administrators, teachers, and support personnel, to improve their health status. These opportunities encourage staff to pursue a healthy lifestyle that contributes to their improved health status, improved morale, and greater personal commitment to the overall coordinated school health program.

This personal commitment often transfers into greater commitment to the health of students and serving as positive role models. Health promotion activities conducted on-site improve productivity, decrease absenteeism, and reduce health insurance costs. Qualified professionals such as principals, supervisors, health educators, school health nurses, and school personnel/human resources directors provide leadership in this area.

Schools can visit the department's [Division of Coordinated School Health, Staff Wellness website](#) for additional resources and support.

Student, Family, and Community Involvement

The involvement of students, families, and community stakeholders in schools provides an integrated approach for enhancing the health and well-being of students both at school and in the community. Qualified professionals such as principals, teachers, school health, and family support staff, along with students, families, and volunteers, provide leadership in this area. By actively soliciting student and family involvement and engaging with community stakeholders, schools can build support for positive education and health programs.

[SBE policy 4.207](#) outlines charter school responsibility for developing and implementing a parental/family involvement and engagement program(s) and practices that ensure compliance with [T.C.A. § 49-2-305](#) and [T.C.A. § 49-6-7001-7005](#).

Best practices and implementation support on effective parental involvement and family engagement can be found on the department's [Coordinated School Health, Student, Family, and Community Involvement website](#).

Data and Reporting

Charter school leaders make many high-stakes decisions before the school opens. Nearly all those decisions rely on data.

In the planning year, data systems are often treated as an operational task to be handled later. In practice, early decision about how data is collected, reviewed, and used shape how the school operates when it opens. When data systems are unclear, leaders often do not identify problems until the results are final and options are limited. The table of [Commonly Used Data Systems](#) can provide a starting point for identifying what data systems are needed.

This chapter is designed to support early planning by helping to:

- Understand why data systems matter in the planning year
- Clarify what decisions data should support in the pre-opening year and early Year 1
- Establish clear expectations for ownership, accuracy, and review
- Distinguish between legal requirements and strong practices
- Build awareness of the systems and reporting structures necessary

Some sections are intended for close reading during the planning year. Others are designed to be referenced as the school grows. What matters most is developing the right mindset. Data is not just something the school reports. It is a leadership tool that supports sound decision-making and early course correction.

Key Points

- **Start with decisions, not tools.**
Be clear about the questions that need to be answered to lead the school. Some of the data needed to answer those questions will already be defined by the state or the authorizer.
- **Understand what is required and what is flexible.**
Tennessee and charter authorizers prescribe certain data elements, systems, and reporting timelines. Leaders should understand what must be collected and reported through state or authorizer systems, and where there is flexibility to collect additional data that supports local decision-making.

- **Limit early data collection to what supports near-term decisions.**
In the planning year, focus on data that informs enrollment, attendance, instruction, and early interventions. Avoid collecting additional data unless it clearly supports a leadership decision.
- **Use systems that support accuracy and consistency rather than complexity.**
Required state systems form the backbone of school data. Local systems and tools should align with these requirements and reduce duplication or manual entry where possible.
- **Establish review routines before dashboards or automation.**
Clear ownership and regular review matter more than sophisticated reporting tools. Build habits around when data is reviewed and how it is used before investing in advanced dashboards or automation.

Data Leadership

While being a data expert is not necessary, a school leader must take responsibility for how data functions inside the school. School leaders are accountable for:

- Setting clear expectations for data accuracy, ownership, and review
- Ensuring staff and vendors follow consistent data practices
- Protecting student and staff data
- Using data to inform decisions, not just to meet reporting requirements

Authorizers and the department are important partners in this work and can help clarify requirements, timelines, and common pitfalls. Asking questions early and often is an effective way to build confidence and avoid issues.

Peer learning and informational interviews are often among the most efficient ways to deepen understanding of data and strengthen early planning efforts. Others have experience with the development of these systems, and conversations with other school leaders can surface practical insights about what to prioritize, where risks tend to emerge, and what they wish they had understood earlier.

Data Leadership Framework

Before selecting tools or building reports, school leaders should be clear about the decisions they need to make and how often they need to make them. Data systems work best when they are built to support decisions, not the other way around.



This framework can be used throughout the planning year and beyond. When data feels overwhelming, return to the decision it is meant to support. The following chart is an.

Following the Data Leadership Framework	
Decisions	<p>The leader's focus is on questions that need to be answered to lead the school effectively.</p> <ul style="list-style-type: none"> • Are we enrolling the students we planned for? • Are attendance patterns stabilizing? • Are early academic signals aligned with expectations?
Data	<p>The leader's focus is on information that helps answer those questions.</p> <ul style="list-style-type: none"> • Enrollment dates • Attendance records • Interim assessment results • Student characteristics
Systems	<p>The leader's focus is on where the data is entered, stored, and reported.</p> <ul style="list-style-type: none"> • Student information system (SIS) • Assessment platforms • State reporting systems
Routines	<p>The leader's focus is on how often data is reviewed and what actions follow.</p> <ul style="list-style-type: none"> • Weekly enrollment checks • Monthly attendance review • Regular instructional data meetings

Data Culture

School leaders are responsible for establishing the culture and standards for how data is collected and used across the school. This includes:

- Setting expectations for data accuracy, consistency, and use
- Assigning clear ownership for data entry, review, and correction
- Ensuring staff understand the data they collect and how it is used
- Reinforcing how data errors affect students, funding, and school operations
- Knowing which data are required by charter agreements and performance frameworks and planning for their collection during the pre-opening year

Accurate, reliable data is the result of clear leadership expectations, defined ownership, and consistent routines. In the planning year, school leaders play a central role in shaping how data is collected, reviewed, and used at the school.

Data Practices

Leaders should prioritize the following practices early. They reinforce shared responsibility for data quality and reduce the risk of issues surfacing after data is analyzed and results are finalized.

- **Define roles** for data entry, review, and approval
- **Use standard procedures** for enrollment, attendance, scheduling, and data entry
- **Conduct regular audits** of ADM, student classification codes, special education data, English Learner data, and course codes
- **Establish written rules** for privacy, data retention, and vendor access to student data
- **Teach staff** how daily data practices influence funding and accountability
- **Explicitly assign data governance and quality assurance roles to staff.** Doing this will provide a sense of ownership of data and processes.
- **Adopt or develop documented internal procedures** for data entry, review, and approval.

Data Quality

In Tennessee, information entered at the school level flows through state systems and becomes the basis for:

- TISA funding calculations
- Accountability determinations and public reporting
- Authorizer monitoring and charter agreement oversight

Because these outcomes rely on school-reported data, accuracy at the point of entry matters more than downstream corrections. **Errors in enrollment, attendance, scheduling, staffing, or student characteristics can affect funding, accountability results, and compliance findings**, even when the underlying program or instruction is strong.

Strong data quality helps prevent funding loss, incorrect accountability results, and inaccurate reporting. Quality data is:

- **Correctly match** real student, staff, and operational conditions
- **Complete** without missing or late information
- **Consistent** across systems, reports, and time periods
- **Aligned** with how the school operates and delivers instruction

Defined Ownership

Clear ownership and routine review are among the most effective ways to prevent data errors, particularly in charter schools that rely on multiple systems and vendors.

Leadership Expectation	
Data entry	Roles are clearly defined, and staff are trained on required fields and timelines
Data review	Routine checks are scheduled to identify and correct errors before reporting windows
Data approval	Final verification responsibility is clearly assigned
Access control	Sensitive data is limited to staff with a legitimate need for the data
Vendor use	Vendors follow school-defined data standards, privacy rules, and access controls

The [Forum Guide to Strategies for Education Data Collection and Reporting](#) provides an overview of data strategy in education, practical approaches to data collection and reporting, and examples from education agencies that illustrate how these practices are implemented in real settings.

Data Awareness

Many data-related compliance issues do not stem from intentional errors. They arise when leaders lack early visibility into how data are collected, reviewed, and reported. Developing awareness early helps to be able to ask better questions, plan for the future, and reduce the likelihood of being caught off guard by funding, accountability, or compliance outcomes later.

School leaders are expected to understand how core data systems function and how data move through required reporting structures. In the planning year, the priority is developing early awareness of which data inform leadership decisions and how those data connect to funding, accountability, and oversight, with deeper operational detail building over time.

The sections that follow provide more detail on each data area. This section is intended to orient on what is needed now and why deeper understanding will matter as the school prepares to open and operate.

Data Awareness Needs	
Student Data	How enrollment, attendance, schedules, student characteristics, and program participation are captured in the SIS; how these data flow to state systems; and how accuracy affects funding, accountability, and oversight
Staff Data	How staff licensure, assignments, and course associations are recorded across systems; how misalignment affects reporting and accountability;; and why ongoing review is required
Assessment and Accountability Data	How interim, benchmark, and summative assessment data relate to Tennessee accountability measures, public reporting, and authorizer evaluation
Protected Data	How special education, English Learner, and other protected student data are documented, accessed, and safeguarded; and the legal responsibilities associated with their use
Financial Data	How financial records reflect enrollment-driven funding, staffing, and expenditures; and how these data support fiscal oversight, audits, and sustainability

Student Data

Student data form the foundation of Tennessee’s school funding, accountability, and reporting systems. Nearly every other data domain described in this chapter depends on student enrollment, attendance, scheduling, and characteristics being accurate and timely.

Student data identify who enrolls, how long students attend, how students receive instruction, and how students participate in programs and supports. In Tennessee, these data are entered into the SIS and flow to state data systems such as TEDS, TNPulse, TCAP tools, etc. Please see the [Student Information System \(SIS\) Vendor List](#) and the [TISA Guide and Accountability Report Resources](#) for additional guidance.

Student enrollment dates, daily schedules, attendance, and student characteristic codes directly affect a school’s ADM and weighted TISA funding calculations. These data are relied upon by authorizers and the department as submitted, which makes accuracy at the school level especially important. School leaders must ensure clear processes for data entry, review, and correction and confirm accuracy before each reporting window.

Key Points

- Student data definition**
 Student data include enrollment, demographics, schedules, attendance, discipline, grades, programs, accommodations, and assessments.
- System of record**
 Charter schools must use a SIS from the state-approved [vendor list](#), and the SIS serves as the system of record for all student data submitted to the state.
- Data flow from school to the department**
 Student data entered locally flow into TEDS through EIS and drive funding, accountability, and public reporting.
- Authorizer reliance and coordination**
 Charter authorizers rely on state-reported student data to monitor compliance, performance, and charter agreement obligations. School leaders should confirm student data requirements and processes with their authorizer during the pre-opening year.

Student data are often the first place where planning assumptions meet reality. Spending time early to understand how this data work, how they are reviewed, and how they are reported gives more control over outcomes later.

Strong Student Data Practices	
A well-configured system of record	A state-approved SIS is selected and configured so required student data fields align with Tennessee reporting and TEDS expectations
Clear alignment with authorizer requirements	Student data collection methods align with authorizer standards, including required forms, timelines, and validation processes.
Defined ownership and accountability	Responsibility for enrollment, scheduling, attendance, and student classification data is clearly assigned, including who enters, reviews, corrects, and verifies data.
Regular review before reporting windows	Student data are reviewed routinely before and during reporting windows to identify and correct issues that could affect TISA funding or accountability results.
Clear correction and follow-up processes	There is a defined process for correcting student data and confirming that updates are reflected accurately in EIS and TEDS.

Strong Student Data Practices	
Coordination with state and authorizer partners	The school maintains active communication with the LEA student data contact to resolve reporting questions, submission issues, and data corrections.
Reduced manual data entry	Third-party systems are integrated using secure imports or APIs where possible to reduce manual entry and data mismatch risk.
Staff readiness and continuity	Staff responsible for student data are trained on required fields and timelines, and written procedures are maintained to support continuity during staff transitions

Staff Data

Staff data connect instructional staffing, licensure, and assignments to student learning, accountability, and compliance. Accurate staff data ensures that students are taught by appropriately licensed educators, that courses are coded correctly, and that student data are processed accurately across state systems.

Errors in staff data can disrupt assessment reporting, invalidate course records, and trigger compliance findings. For charter school leaders, staff data is not just a human resources concern. They are a core component of instructional quality, accountability, and oversight.

Staff data often reveal the gap between how a school intends to operate and how it is required to report its work. Staffing models, schedules, and instructional plans may make sense programmatically, but they must also align with licensure rules, assignment requirements, and system constraints that are enforced through data. Spending time early to understand how staffing decisions appear in data systems gives leaders more control over outcomes later and reduces the need for disruptive corrections once the school is operating.

This work is closely connected to other planning decisions. Personnel policies, academic program design, and scheduling choices all shape how staff data are recorded and reviewed. Reviewing those sections of this toolkit in concert can help leaders anticipate where instructional priorities and reporting requirements intersect and where additional planning or clarification may be needed.

When staff data responsibilities are delegated, effective leadership requires more than assigning a task. Leaders should provide clear expectations, time for system setup, and regular opportunities to review data together. A trust-and-verify approach, paired with early investment in training and routines, gives team members the runway to manage staff data effectively and helps ensure staffing decisions are reflected accurately in required reporting.

Key Points

- **Staff data scope:** Staff data include licensure status, endorsements, assignments, course associations, evaluations, professional development records, compensation, and employment status.
- **Multiple systems involved:** Staff data are maintained across the school’s human resources system, the Student Information System, and TNCompass.
- **Licensure and assignment linkage:** TNCompass captures educator licensure, salary, assignment, and evaluation data that must align with course and class assignments in the SIS. Staff course and class assignments must be accurate to correctly link students to licensed instructors for assessment and reporting.
- **Impact on student data:** Errors in staff data can affect student course records, assessment provisioning, and data submission to TEDS.
- **Compliance and oversight:** Authorizers and the department rely on staff data to verify licensure compliance, appropriate assignments, and instructional staffing patterns.

Strong Staff Data Practices	
Clear system alignment	Staff licensure and assignment data are aligned across the human resources system, the Student Information System, and TNCompass.
Assignment and licensure verification	Licensure status and endorsements are reviewed regularly to ensure staff are appropriately assigned throughout the year.
Defined ownership and review	Responsibility for entering, reviewing, and verifying staff data is clearly assigned, including final checks before reporting windows
Course and class accuracy	Course codes, class assignments, and teacher associations are reviewed to ensure students are correctly linked to licensed instructors.
Limited manual duplication	Manual entry of staff data across systems is minimized through coordinated updates and consistent procedures.
Staff transitions and continuity	Processes are documented so staff data remain accurate during onboarding, role changes, or turnover.

State Assessment and Accountability Data

These data support state accountability systems and charter oversight. They establish how student performance is measured, reported, and evaluated against state expectations.

In Tennessee, assessment participation and results depend on accurate student enrollment, course enrollment, and staff-course associations. Errors or misalignment in student or staff data can prevent students from being tested appropriately, exclude results from accountability calculations, or create discrepancies that are difficult to resolve after testing windows close.

Because accountability results are based on finalized data, opportunities for correction are limited once assessment windows and reporting timelines have passed.

Key Points

- **Assessment systems reflect upstream decisions.**
Assessment participation, test assignments, and accommodations are determined by how students are enrolled, scheduled, and associated with courses and staff well before testing begins.
- **Most assessment issues originate outside the assessment platform.**
When students are missing tests or misassigned, the root cause is often misalignment in student or staff data rather than a failure of the testing system itself.
- **Assessment provisioning is a data dependency, not a testing task.**
Accurate student enrollment, course enrollment, and staff-course associations are prerequisites for students being assigned the correct assessments.
- **Student accommodations require both instructional intent and data accuracy.**
Students must be correctly identified, coded, and scheduled for accommodations to be delivered as intended during assessments.
- **Once accountability data are finalized, options narrow quickly.**
Accountability results are based on submitted data and are difficult to revise after reporting windows close, which makes early review and verification especially important.
- **Accountability is built on a narrow but consequential slice of data.**
State accountability systems rely on assessment results and a defined set of indicators, which means small data errors can have outsized effects on reported performance.

State assessment and accountability work often touches more people than leaders initially expect. Even in the planning year, this area cuts across academics, operations, student data, special populations, and scheduling. While teams may still be small, the decisions made now will shape how responsibilities are distributed and understood as the charter organization grows.

This work cannot be segmented to a single role or function. Clear ownership matters, but accuracy and effectiveness depend on shared awareness across the team. Instructional leaders, operations staff, and data leads all influence how assessment data are set up, monitored, and reported. When this understanding is siloed, issues tend to surface late, when options for correction are limited.

As leaders build their teams, assessment and accountability considerations should factor into hiring and role design. The most effective teams include individuals who take ownership, understand how their work connects to larger systems, and recognize the importance of getting assessment-related data right. Investing early in shared understanding, clear expectations, and strong routines helps create collective responsibility while still maintaining clear accountability.

Strong State Assessment and Accountability Data Practices	
Design instruction with assessment in mind	Course offerings, schedules, and instructional assignments are intentionally aligned to assessment requirements so students are tested in the appropriate subjects without last-minute adjustments.
Verify readiness before assessment windows	Student enrollment, course assignments, and accommodations are reviewed in advance of assessment windows to confirm accurate provisioning and avoid issues that cannot be corrected once testing begins.
Assign clear ownership for assessment setup	Responsibility for assessment setup, monitoring, and issue resolution is clearly assigned, with coordination across academic, student data, and operations teams.
Surface and resolve issues early	Processes are in place to identify assessment setup issues early enough to allow for correction before testing windows close.
Document processes to ensure continuity	Assessment procedures, timelines, and responsibilities are documented so expectations remain clear during staff transitions and year-over-year changes.

Protected and Prohibited Data

Protected and prohibited data carry heightened legal, ethical, and operational responsibilities. Errors in how these data are accessed, shared, or stored can create immediate compliance risks and harm trust with students, families, and staff. For school leaders, the primary challenge is not collecting data, but ensuring that access, use, and disclosure are tightly controlled while still allowing staff to support students effectively.

Protected and prohibited data issues rarely arise because staff are unfamiliar with basic terminology or privacy expectations. More often, errors emerge in the gray areas, when it is unclear whether data should be collected, who should have access, or how information should be shared.

Ambiguity is where risk lives. Addressing these gray areas early by defining clear procedures, access rules, and decision points is more effective than adding new tools or policies later. Experience matters here. Authorizers have seen both strong data protection systems and common missteps across schools. Listening carefully to what they flag as frequent sources of error can help leaders focus attention where it will have the greatest impact and protection.

Key Points

- Protected data are governed by federal and state privacy laws and must be handled with care.
- Not all staff should have access to all student or personnel data.
- Vendors and third parties are subject to the same data protection expectations as school staff.
- Prohibited data should not be collected, stored, or shared under any circumstances. This includes:
 - Sensitive personal characteristics with no educational purpose
 - Medical and biometric information beyond what is required
 - Criminal and legal history not required for school operations
- Most data privacy issues stem from unclear access rules.

Personally identifiable information (PII) identifies an individual student or staff member and includes information that can identify an individual on its own or when combined with other data. Charter schools collect and use PII to operate programs and meet reporting requirements, but federal and Tennessee law require schools to protect this information and limit how and to whom it is disclosed. These responsibilities apply to data stored in school systems as well as

vendor platforms, and schools retain legal responsibility for PII regardless of where the data reside. Improper access, sharing, or storage of protected data can result in compliance findings and corrective action.

The [Common Data Types and Classification](#) provides a high-level map of common data types schools handle, how they are classified, and which laws govern their use. It is not intended to replace legal guidance or detailed policy, but to help quickly understand where heightened care, access controls, or avoidance are required.

Strong Protected and Prohibited Data Practices	
Role-based access controls	Access to protected data is limited to staff with a legitimate educational or operational need.
Clear vendor expectations	Contracts and agreements clearly define how vendors may access, store, and use protected data.
Written privacy procedures	Policies and procedures outline data access, sharing, retention, and disposal expectations.
Staff awareness and training	School leaders train staff on protected and prohibited data requirements so daily practices comply with federal law and T.C.A. § 49-1-701 et seq.
Monitoring and review	Access permissions and vendor compliance are reviewed regularly to ensure alignment with expectations.

Financial Data

Financial data record how a charter school receives, spends, and safeguards public funds. These data include budgets, accounting records, bank activity, payroll, contracts, and audit documentation. Charter schools must follow the internal control and accounting standards established by the Office of the Tennessee Comptroller. While schools may delegate bookkeeping or accounting functions, school leaders remain responsible for ensuring that financial records are complete, accurate, and maintained in compliance with state requirements.

Financial data also connects directly to state funding. Enrollment and student characteristics determine TISA revenue, while budgets and expenditure tracking demonstrate whether the school can operate within the revenue generated. School leaders must monitor

financial data regularly to maintain cash flow, respond to enrollment changes, and meet authorizer, audit, and state reporting expectations.

The Finance and Resources chapter provides an important starting point for understanding budgeting, cash flow, and financial controls and should be reviewed alongside this section. For schools partnering with an external financial or back-office provider, leaders should confirm that partners understand Tennessee-specific financial data, coding, and reporting requirements.

Financial compliance is one of the most common challenge areas for charter schools. Founding teams often have less experience managing financial data, which increases the risk of errors that can affect cash flow, audits, and authorizer oversight. Leaders should be intentional about how they leverage their governing board, external partners, and advisors to support accurate financial data management and review.

Compliance with financial data requirements depends on both systems and routines. Even when financial operations are delegated, leaders must ensure financial data are accurate, timely, and well-documented, with regular review to meet authorizer and audit expectations. Because financial data requirements and guidance can change, leaders should monitor updates from their authorizer and the department and adjust practices as needed.

Key Points

- **Accurate and complete financial records**

All revenues and expenditures must be recorded promptly in the school's accounting system and supported by appropriate source documentation.

- **Standardized financial coding**

Financial data must be coded consistently using the Comptroller-approved chart of accounts so reports are comparable across months, fiscal years, and audits.

- **Monthly reconciliation and validation**

Bank statements, general ledger balances, and subsidiary records must be reconciled regularly. Discrepancies must be investigated, resolved, and documented.

- **Ongoing budget monitoring**

Budget-to-actual reports must be reviewed regularly to identify variances, cash flow risks, or spending patterns that require adjustment.

- **Alignment with enrollment-driven funding**

Financial data should be reviewed alongside ADM, staffing, and program data to ensure expenditures remain consistent with TISA-generated revenue.

- **Audit and authorizer readiness**

Financial records must be organized according to retention schedules and maintained in a manner that supports authorizer review and independent audits.

- **Board oversight and reporting**

Clear, accurate financial reports must be shared with the governing board to support oversight, planning, and corrective action when needed.

Appendices

A. Facilities Pre-opening Checklist

Phase	Focus	Best Practice
Set The Foundation	Affordability guardrails	Develop a Year 1 budget; build a multi-year projection; set enrollment scenarios; set the maximum affordable rent or debt service.
	Team and governance	Form a facilities subcommittee; define roles; set a meeting schedule.
	Program and space requirements	State must-have and nice-to-have requirements; set classroom counts; define specialized spaces; identify long-term space needs.
Search and Evaluate Options	Search strategy	Use multiple brokers; contact partners; review unused public buildings; set a weekly search process.
	Site visits and due diligence	Verify zoning; review building systems; check environmental conditions; estimate renovation needs and costs.
	Financial pro forma by site	Build a site pro forma; test enrollment assumptions; compare total occupancy costs; assess long-term fit.
Secure the Site	Negotiation and LOI	Draft the LOI; confirm rent terms; identify tenant improvements; secure early access; secure board approval.
	Negotiation and LOI	Begin zoning applications; obtain building permits; coordinate with local officials.

Phase	Focus	Best Practice
Build and Prepare	Construction and renovation	Hire a contractor; set the scope; monitor the budget; monitor the schedule; track long-lead items.
	Fire marshal and safety compliance	Schedule safety inspections; confirm egress routes; confirm alarms; confirm sprinklers; confirm safety systems.
Final Readiness for Opening	Certificate of Occupancy	Complete inspections; resolve remaining issues; secure the certificate of occupancy.
	FF&E	Order furniture and IT; set up technology, access control, and connectivity.
	Authorizer pre-opening review	Submit facility documents; schedule the walkthrough; resolve findings.
	Move-in and school setup	Clean the facility; set up classrooms; finalize traffic flow; test IT; test access systems.

B. School Health Pre-Opening Checklist

Action Steps and Aligned Practices	
Align with the authorizer	<ul style="list-style-type: none"> • Ask for shared resources, templates, and the pre-opening year expectations • Confirm what must be ready for the pre-opening visit. • Check for recommended vendors or shared nursing options.
Choose the staffing model	<ul style="list-style-type: none"> • Decide whether to hire a nurse, contract services, or train designated staff. • Budget for the model and confirm delegation rules. • Note: An RN must be available for any nursing tasks that require clinical judgement.
Draft required health policies	<ul style="list-style-type: none"> • Medication administration and self-carry rules. • Emergency care (allergies, asthma, diabetes, seizures). • Communicable disease procedures. • Health records handling and privacy.
Set up the health office	<ul style="list-style-type: none"> • Prepare a private, accessible space. • Install secure medication storage and refrigeration if needed. • Stock first aid and emergency care supplies.
Build systems for student health records	<ul style="list-style-type: none"> • Create a process to collect immunization records before attendance. • Set up secure storage for health forms, IHPs, and permissions. • Plan how staff will communicate with families about missing items.
Plan for chronic condition management	<ul style="list-style-type: none"> • Establish a workflow to identify students with health needs. • Collect Individual Health Plans (IHPs) and doctor authorizations. • Schedule staff training related to specific conditions
Prepare required staff training	<ul style="list-style-type: none"> • CPR and first aid. • Medication administration. • Anaphylaxis, diabetes, asthma, and seizure protocol training.
Plan the screening approach	<ul style="list-style-type: none"> • Decide which screenings will be conducted. • Identify providers and schedule parent notifications.

Prepare for pre-opening	<ul style="list-style-type: none">• Conduct a mock walkthrough of the health office and documents.• Ensure all policies, forms, and supplies are finalized.
Set an annual compliance rhythm	<ul style="list-style-type: none">• Build a calendar for screenings, plan renewals, and required training.• Set expectations for updating health plans and medication permissions each year

C. Student Transportation Pre-Opening Checklist

Planning Areas and Aligned Action Steps	
Align to charter application plan	<ul style="list-style-type: none"> Review the transportation plan included in the approved charter application and begin executing it. Assess feasibility, identify challenges early, and work with the authorizer to resolve gaps or pursue a charter amendment if the model needs to change.
Budget & funding	<ul style="list-style-type: none"> Request transportation funding details from the LEA. Model full costs (buses, drivers, insurance, supervision) Determine financial viability and address early gaps.
Transportation supervisor	<ul style="list-style-type: none"> Designate a supervisor early. Enroll them in required state training Establish their responsibilities for safety oversight, compliance, and documentation.
Vendor or district partnerships	<ul style="list-style-type: none"> Contact authorizer/geographic LEA to determine if a partnership is an option. If applicable, compare costs of partnership versus a vendor. If using a vendor, follow the applicable procurement policies and establish a contract that details the scope (e.g., routing, maintenance, driver training), compliance expectations and cost structures.
Policies & procedures	<ul style="list-style-type: none"> Draft transportation policies aligned with TN law and authorizer polices. Establish processes and procedures for every aspect of student transportation.
Routing & scheduling	<ul style="list-style-type: none"> Map potential routes, timing, pick-up/drop-off procedures. Determine staffing needs. Develop contingency plans based on family demand and bell schedules.
Safety systems	<ul style="list-style-type: none"> Establish processes for inspections, maintenance, driver training, emergency response, incident reporting, and required state recordkeeping.
Family communication	<ul style="list-style-type: none"> Clearly communicate transportation availability, expectations, routes, schedules, and limitations in enrollment materials and orientations.
Pre-opening readiness	<ul style="list-style-type: none"> Conduct trial runs or mock routes. Verify compliance documentation. Ensure vehicles, drivers, policies, and communication systems are ready for Day 1.

Special education transportation

- Estimate likely need.
- Plan specialized routes or vendor support.
- Confirm compliance mechanisms
- Ensure services are ready regardless of general transportation decisions.

D. School Safety Pre-Opening Checklist

School Safety Plan & EOP

- Begin drafting the **Emergency Operations Plan** using the state template; outline prevention, mitigation, response, and recovery procedures.
- **Meet early with the authorizer and the department** to confirm expectations, submission dates, and required documentation.
- **Build the drill calendar now** (fire, intruder, relocation, severe weather, lockdown) to ensure state-required cadence and documentation.

Leadership, Teams & Training

- **Appoint the School Safety Coordinator early**; ensure they complete required state training and understand their oversight duties.
- Establish the **internal safety team**, including threat assessment, crisis response, and emergency communication roles.
- Create a **staff-wide training schedule** that includes safety procedures, emergency protocols, student management, and reporting expectations.
- **Integrate safety into new staff orientation** and ongoing professional development.
- **Build routines for team readiness checks**

Facilities, Systems & Daily Operations

- **Design the facility for safety**, including controlled entry, secure vestibules, camera placement, internal visibility, signage, and communication systems.
- **Set up the visitor management system** and determine day-to-day procedures for entry, badges, and monitoring.
- **Align daily operations** (arrival, dismissal, hallway transitions, recess, after-school programming) **with safety procedures**.
- **Develop processes for incident reporting, internal communication, and coordination with emergency responders.**
- **Ensure all safety systems** (door hardware, alarms, cameras) **are tested** before opening.

E. Commonly Used Data Systems

Commonly Used Data Systems		
Student Information System (SIS)	Local system of record for student enrollment, schedules, attendance, grades, and demographics	Data entered in the SIS flow into state systems which directly drive TISA funding, accountability calculations, and compliance reporting.
Tennessee Education Data System (TEDS)	State data warehouse that receives student and staff data from local systems	TEDS is the system the state uses to calculate funding, accountability, and public reports, making upstream data accuracy critical.
SWORD	State data dashboard for schools to review the data their SIS sends to the department	SWORD allows school and district leaders to review important student data that affects TISA funding. Link: SWORD
TN Share	State managed data file sharing platform that houses enrollment and funding data	The department's single sign on (SSO) site allows school leaders to access several state managed platforms through one site. Link: https://orion.tneducation.net/unauthorized
TNCompass	State system for educator licensure, evaluations, assignments, and compensation data	Accurate staff data in TNCompass ensures licensure compliance and correct staff-to-course associations that affect student data processing. Link: TNCompass
State Report Card	State dashboards for school performance, designations, and public reporting	These dashboards reflect final accountability outcomes. Link: State Report Card
Universal Reading Screener	Locally adopted systems used to administer local URS assessments	Assessment systems generate data that drive accountability outcomes and must align with SIS and staff assignments. Link: URS Vendor and District Responsibilities.pdf
Human Resources Information System and Enterprise Resource Management systems	Locally adopted systems used to track employee data, budgets, expenditures, payroll, and financial reporting	Personnel and financial systems demonstrate stewardship of public funds and are the systems of record for personnel and school finances.

Commonly Used Data Systems

Single Sign-on and Provisioning Platforms	Third-party tools that feed student data to third party vendors (i.e., Clever, Classlink, Azure, etc.)	Schools remain legally responsible for data protection and accuracy even when vendors collect or store data.
CCR Portal	Houses student data related to college and career readiness indicators and outcomes.	CR data contribute to accountability measures and reflect whether students are meeting postsecondary readiness expectations
Cohort Data	Tracks groups of students over time for graduation, completion, and outcome reporting.	Cohort definitions directly affect graduation rates and accountability results and are difficult to correct once established.
ePlan	Supports planning, documentation, and submission of required state plans and assurances.	ePlan is the official system for demonstrating compliance with required plans and program expectations.
ePlan InformTN	Provides public-facing access to selected plans, data, and reports submitted through ePlan.	Information in InformTN shapes public transparency and stakeholder understanding of school performance and plans.
SPEAR	Manages special education data, including services, timelines, and compliance documentation.	Accurate SPEAR data are essential for meeting IDEA requirements and avoiding special education compliance findings.
TN PULSE	Supports family engagement and access to resources related to special education and student support.	TN Pulse reinforces parent rights and informed participation, which is critical for compliance and trust.
TCAP Visibility Tool	Displays assessment participation and performance data for state testing.	The tool helps leaders verify assessment outcomes and understand how results will appear in accountability reporting.

Commonly Used Data Systems

School's LMS	Manages instructional content, assignments, and classroom-level assessment data.	LMS data support progress monitoring and instructional decisions but must align with SIS and assessment systems to avoid inconsistencies.
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F. Common Data Types and Classification

Common Data Types and Classification	
Student education records	<ul style="list-style-type: none"> • Examples: Enrollment, grades, transcripts, attendance, discipline • Protected data • Governing Federal Law: FERPA, 20 U.S.C. § 1232g; 34 C.F.R. Part 99 • Governing Tennessee Law: T.C.A. § 49-1-701 et seq.
Personally identifiable information (PII)	<ul style="list-style-type: none"> • Examples: Name, student ID, date of birth, address, indirect identifiers • Protected data • Governing Federal Law: FERPA, 20 U.S.C. § 1232g • Governing Tennessee Law: T.C.A. § 49-1-701 et seq.
Special education records	<ul style="list-style-type: none"> • Examples: IEPs, evaluations, disability classifications • Protected data • Governing Federal Law: IDEA, 20 U.S.C. § 1400 et seq.; FERPA • Governing Tennessee Law: T.C.A. § 49-10-101 et seq.
Section 504 records	<ul style="list-style-type: none"> • Examples: 504 plans, disability documentation • Protected data • Governing Federal Law: Section 504, 29 U.S.C. § 794; FERPA • Governing Tennessee Law: T.C.A. § 49-10-101 et seq.
English Learner data	<ul style="list-style-type: none"> • Examples: Home language survey, EL status, proficiency scores • Protected data • Governing Federal Law: Title VI, 42 U.S.C. § 2000d; FERPA • Governing Tennessee Law: T.C.A. § 49-6-6001 et seq.
Student health records (school-maintained)	<ul style="list-style-type: none"> • Examples: Immunizations, medication records, screenings • Protected data • Governing Federal Law: FERPA (not HIPAA in K-12) • Governing Tennessee Law: T.C.A. § 49-6-5001 et seq.
Student assessment results	<ul style="list-style-type: none"> • Examples: State tests, benchmark assessments linked to students • Protected data • Governing Federal Law: FERPA • Governing Tennessee Law: T.C.A. § 49-1-602 et seq.

Common Data Types and Classification

Student survey responses (sensitive topics)	<ul style="list-style-type: none"> • Examples: Mental health, political beliefs, religion, family income • Protected / Restricted data • Governing Federal Law: PPRA, 20 U.S.C. § 1232h • Governing Tennessee Law: T.C.A. § 49-1-701 et seq.
Biometric identifiers	<ul style="list-style-type: none"> • Examples: Fingerprints, facial recognition, voiceprints • Protected / Restricted data • Governing Federal Law: FERPA • Governing Tennessee Law: T.C.A. § 49-1-701 et seq.
Student discipline and safety records	<ul style="list-style-type: none"> • Examples: Suspensions, expulsions, incident reports • Protected data • Governing Federal Law: FERPA • Governing Tennessee Law: T.C.A. § 49-6-3401 et seq.
Aggregate student or staff data	<ul style="list-style-type: none"> • Examples: Grouped data, reports, dashboards • Conditionally protected data • Governing Federal Law: FERPA disclosure avoidance • Governing Tennessee Law: T.C.A. § 49-1-701 et seq.
Staff personnel records	<ul style="list-style-type: none"> • Examples: Evaluations, disciplinary actions, employment records • Protected data • Governing Tennessee Law: T.C.A. § 10-7-504
Staff licensure and credentials	<ul style="list-style-type: none"> • Examples: License status, endorsements • Protected data • Governing Tennessee Law: T.C.A. § 49-5-101 et seq.
Criminal history and background checks	<ul style="list-style-type: none"> • Examples: Fingerprint results, TBI/FBI reports • Protected data • Governing Federal Law: FBI/TBI rules • Governing Tennessee Law: T.C.A. § 49-5-413
Financial personal data	<ul style="list-style-type: none"> • Examples: Bank accounts, direct deposit, tax forms • Protected data • Governing Federal Law: Federal privacy and identity theft laws • Governing Tennessee Law: T.C.A. § 10-7-504
Prohibited student data (general)	<ul style="list-style-type: none"> • Examples: Data barred by statute unless expressly authorized • Prohibited data • Governing Federal Law: FERPA, PPRA • Governing Tennessee Law: T.C.A. § 49-1-701 et seq.

Common Data Types and Classification

Prohibited student surveys or profiling

- Examples: Data collected without required notice or consent
- Prohibited data
- Governing Federal Law: PPRA, 20 U.S.C. § 1232h
- Governing Tennessee Law: T.C.A. § 49-1-701 et seq.

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