
BEFORE THE TENNESSEE STATE BOARD OF EDUCATION

IN RE: JOURNEY ACADEMY OF SUCCESS Charter School Appeal)))))))	State Board of Education Meeting October 19, 2018
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**FINDINGS AND RECOMMENDATION REPORT
OF THE EXECUTIVE DIRECTOR**

Pursuant to Tennessee Code Annotated (T.C.A.) § 49-13-108, sponsors proposing to open new charter schools may appeal the denial of their amended application by a local board of education to the State Board of Education (State Board). On August 24, 2018, Journey Academy of Success (Journey) appealed the denial of its amended application by Metro-Nashville Public Schools (MNPS) Board of Education to the State Board.

Based on the following procedural history, findings of fact, and Review Committee Report attached hereto, I believe that the decision to deny the Journey’s amended application was not “contrary to the best interests of the pupils, school district, or community.”¹ Therefore, I recommend that the State Board affirm the decision of MNPS to deny Journey’s amended application.

STANDARD OF REVIEW

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

In order to overturn the decision of the local board of education, the State Board must find that the local board’s decision to deny the charter application was contrary to the best interests of the pupils,

¹ T.C.A. § 49-13-108.

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

³ T.C.A. § 49-13-108.

school district, or community.⁴ Because Journey is proposing to locate in a school district that contains a school on the current or last preceding priority school list, the State Board has the ability to approve the application, and thereby authorize the school, or to affirm the local board's decision to deny.

PROCEDURAL HISTORY

1. ReThink Forward, Inc. (Sponsor) submitted its completed initial application for Journey to MNPS on April 2, 2018.
2. MNPS assembled a review committee to review and score the Journey application. The review committee recommended denial of the Journey initial application.
3. On May 22, 2018, a MNPS panel, which included external expert reviewers, held a capacity interview with the Sponsor.
4. On June 26, 2018, the MNPS Board of Education voted to deny Journey's initial application based upon the review committee's recommendation.
5. The Sponsor amended and resubmitted its application for Journey to MNPS on July 26, 2018.
6. MNPS's review committee reviewed and scored Journey's amended application and again recommended denial.
7. On August 14, 2018, based on the review committee's recommendation, the MNPS Board of Education voted to deny Journey's amended application.
8. The Sponsor appealed the denial of Journey's amended application in writing to the State Board on August 24, 2018, including submission of all required documents per State Board policy 2.500.
9. At the time of appeal to the State Board, the Sponsor did not submit any corrections to the application as allowed under T.C.A. § 49-13-108(a)(4)(C).
10. The State Board's Review Committee analyzed and scored the Journey amended application using the Tennessee Department of Education's charter application scoring rubric.
11. On September 10, 2018, the State Board staff held a public hearing in Nashville. At the public hearing, the Director of Charter Schools, sitting as the Executive Director's designee, heard presentations from the Sponsor and MNPS and took public comment regarding the Journey application.
12. The State Board's Review Committee conducted a capacity interview with the proposed governing board of Journey and key members of the leadership team on October 2, 2018, in Nashville.

⁴ T.C.A. § 49-13-108.

13. After the capacity interview, the Review Committee determined a final consensus rating of Journey's amended application, which served as the basis for the Review Committee Recommendation Report.

FINDINGS OF FACT

- **District Denial of Application.**

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

Name	Title
John Thomas	Planning Facilitator, MNPS (initial and amended)
Katy Enterline	Coordinator of Talent Management, HR, MNPS (initial and amended)
Michelle Doane	Consultant (initial and amended)
Dennis Queen	Executive Officer, Charter School Office, MNPS (initial and amended)
Brian Hull	Director, Resource Strategy, MNPS (initial and amended)
Carol Swann	Coordinator, Charter School Office, MNPS (initial)
Gerry Altieri	Principal, Harris Hillman, MNPS (initial)
Rick Caldwell	SPED Coach, MNPS (initial)
Dan Killian	Project Coordinator Exceptional Education, MNPS (initial)
Carol Irwin	ELL Coach, MNPS (initial)
Diane Chumley	ELL Coach, MNPS (initial)
Todd Wigginton	Director, Elementary Instruction, MNPS (initial)
Katy Pattullo	Coordinator, RTI (initial)
Shereka Roby-Grant	Planning Facilitator, Federal Programs, MNPS (initial)
Adrienne Useted	Chief Financial Officer, LEAD Public Schools (initial)
Mary Laurens Minich	Director, Charter School Office, MNPS (amended)
Phyllis Phillips	Director of Pre-K Programs, MNPS (amended)

The Journey initial application received the following ratings from the MNPS review committee:

Sections	Rating
Academic Plan Design and Capacity	DOES NOT MEET STANDARD
Operations Plan and Capacity	DOES NOT MEET STANDARD
Financial Plan and Capacity	DOES NOT MEET STANDARD

After the MNPS review committee completed its review and scoring of the initial application, its recommendation was presented to the MNPS Board of Education on June 26, 2018. Based on the review committee's recommendation, the MNPS Board of Education voted to deny Journey's initial application.

Upon resubmission, the amended application received the following ratings from the MNPS review committee:⁵

Sections	Rating
Academic Plan Design and Capacity	DOES NOT MEET STANDARD
Operations Plan and Capacity	DOES NOT MEET STANDARD
Financial Plan and Capacity	DOES NOT MEET STANDARD

After the MNPS review committee completed its review and scoring of the amended application, its recommendation was presented to the MNPS Board of Education on August 14, 2018. Based on the review committee's recommendation, the MNPS Board of Education voted to deny Journey's amended application.

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

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

Name	Title
Leigh Cummins	Educational Consultant, Washington, D.C.
Jarett Fields	Charter School Assistant Principal, Houston, TX
Ali Gaffey	Deputy Director of Charter Schools, State Board of Education, Nashville, TN
Grant Monda	Executive Director, Aurora Collegiate Academy, Memphis, TN
Hillary Sims	Educational Consultant, Nashville, TN
Jay Whalen	Educational Consultant, Office of Charter Schools, North Carolina Department of Public Instruction, Raleigh, NC

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

Sections	Rating
Academic Plan Design and Capacity	PARTIALLY MEETS STANDARD
Operations Plan and Capacity	DOES NOT MEET STANDARD
Financial Plan and Capacity	DOES NOT MEET STANDARD

The Review Committee recommended that the application for Journey be denied because the Sponsor failed to provide sufficient evidence that it met the required criterion in the academic, operational, and financial sections of the rubric. Specifically, the Review Committee found that the academic plan presented by the Journey did not fully address how the school will serve special populations or implement a robust intervention plan, did not provide a comprehensive marketing and recruitment

⁵ Please see **Exhibit B** for a copy of the MNPS review committee report.

plan or outline the specific role the Charter Management Organization (CMO) will have in the school's operations.

Moreover, the Review Committee opined that the operations plan and capacity section lacked written agreements between the governing board and partnership organizations, did not provide sufficient evidence of the governing board's ability to oversee the school, lacked a detailed plan for building or renovating the anticipated facility, and provided inadequate transportation and staffing plans.

Finally, the Review Committee found that the financial plan and capacity section of the application contained an unrealistic startup budget, lacked sufficient funds for transportation or facility costs, and failed to set forth a contractual cost for services from the proposed CMO. In summary, the Review Committee determined that the Sponsor did not provide sufficient evidence in the academic, operational, and financial sections of the application to meet the required rubric ratings for approval. The capacity interview with the Sponsor did not provide further clarification that would have resulted in a higher rating. Therefore, the Review Committee recommended that the Journey application be denied.

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

- **Public Hearing**

Pursuant to statute⁶ and State Board policy 2.500, a public hearing chaired by the Director of Charter Schools⁷ was held in Nashville on September 10, 2018. MNPS's presentation at the public hearing focused on the argument that the denial of the Journey amended application was in the best interests of the students, school district, and community. MNPS grounded its argument in the deficiencies found by the MNPS review committee in the amended application after conducting a review process aligned to the National Association of Charter School Authorizers (NACSA) best practices and State Board Quality Charter Authorizing Standards. Specifically, MNPS found that Journey's application did not meet the standard for approval based on a number of reasons, including an overall lack of detail in the academic plan, the absence of a record of success from the Sponsor, and a thin transportation plan. MNPS also expressed concerns with the Sponsor's plan to contract with a CMO for all day-to-day operations, and the potential conflict of interest created by the Sponsor's plan to rely on a large loan from the Chief Executive Officer of the CMO. Finally, the district highlighted the lack of a need for additional seats in the school's target area, noting that all schools in the target area are under-enrolled with the exception of one, and that the area already contains nine charter schools.

In response, the Sponsor highlighted the record of achievement of schools operated by the CMO⁸ in other states, arguing that its Indiana turnaround schools have seen dramatic success in the first two years of operation. The Sponsor expressed their belief that the application contained specific detail

⁶ T.C.A. § 49-13-108(a)(4)(B).

⁷ The Executive Director of the State Board selected the Director of Charter Schools as her designee for the public hearing.

⁸ Noble Education Initiative is the proposed CMO.

regarding the proposed academic and operations plan, and that the Sponsor had assembled a capable board with experience in education. They acknowledged that while schools in the target area may be under-enrolled, there is a demand for high performing charter schools in the area, and that Journey would offer parents an additional high quality choice for their children. The Sponsor also highlighted the partnership with Trevecca Nazarene University and the financial backing offered by the CMO as a unique opportunity for a well-financed charter school in an area of need.

A portion of the public hearing was dedicated to taking public comment. A total of four people made verbal comments in support of Journey at the hearing, including the president of Trevecca Nazarene University and educators who work with the CMO's Indiana schools. In addition, the State Board received written public comment on Journey's application via email.

- **Alignment of Metro Nashville Public Schools' Application Process to State Board Quality Authorizing Standards**

Detailed information regarding MNPS's application review process was collected and analyzed by State Board staff to determine alignment with State Board Quality Authorizing Standards as set forth in State Board policy 6.111. At the Public Hearing, State Board staff questioned MNPS regarding its authorization process and alignment to the Quality Authorizing Standards. MNPS articulated that it prides itself on having rigorous standards for approval based on both state standards and NACSA best practices. As evidence of this, MNPS pointed its use of the State rubric for evaluating applications, capacity interviews for every applicant, and the use of both internal and external expert reviewers who are provided training and guidance to ensure a fair review. Finally, MNPS touted the high achievement of many of its charter schools as a direct reflection of its rigorous approval process.

Based on the information presented by MNPS, it appears that the district's process is in alignment with State Board Quality Authorizing Standards and is informed by NACSA best practices. MNPS's commitment toward the continuous improvement of its charter authorization process is clear and worthy of recognition.

ANALYSIS

State law requires the State Board to review the decision of the local board of education and determine whether the denial of the proposed charter school was in the "best interests of the pupils, school district, or community."⁹ In addition, pursuant to T.C.A. § 49-13-108, the State Board adopted Quality Charter Authorizing Standards, set forth in State Board policy 6.111, and utilizes these standards to review charter applications received upon appeal. One such standard is to maintain high but attainable standards for approving charter applications. In making my recommendation to the Board, I have considered the Review Committee Report, the documentation submitted by both Journey and MNPS, the arguments made by both Journey and MNPS at the public hearing, and the public comments received by State Board staff and conclude as follows:

⁹ T.C.A. § 49-13-108.

The Review Committee's report and recommendations are thorough and cite specific examples in the application and reference information gained at the capacity interview in support of its findings. For the reasons explicated in the report, I agree that the Journey amended application did not rise to the level of meeting or exceeding the standards required for approval.

Given the great responsibility of educating students and the amount of public funds entrusted to a charter school that is approved by a local district, the State Board expects that only those schools that have demonstrated a high likelihood of success and meet or exceed the required criteria in all areas will be authorized. To that end, I find the concerns expressed by MNPS to be well taken. I am concerned that the enrollment projections to open in year 1 with 537 students is overly ambitious and will result in the school not being able to meet its anticipated enrollment numbers. These concerns are amplified by the Sponsor's plan to utilize public transportation bus passes instead of buses, especially since a large percentage of students would be too young to access public transportation. I am similarly concerned regarding the Sponsor's plan to contract out the day-to-day operations of the school to a CMO that does not currently have any employees in Tennessee. Additionally, while the Sponsor attempted to rely heavily on the CMO's out of state track record as evidence of quality, no information regarding their out of state schools was included in the application. While the Sponsor clearly has the desire and dedication to serve students in the Nashville community, in addition to the support of a local university, I agree with MNPS and the Review Committee that significant concerns remain about the ability of the Sponsor to successfully open and operate the proposed school in a manner that will improve academic outcomes for their target population.

CONCLUSION

For these reasons, and for the reasons stated in the Review Committee Report attached hereto, I do not believe that the decision to deny the amended application for Journey Academy of Success was contrary to the best interests of the students, the school district, or the community. Therefore, I recommend that the State Board affirm the decision of MNPS to deny the amended application for Journey Academy of Success.



Dr. Sara Heyburn Morrison, Executive Director
State Board of Education

10/15/2018

Date



EXHIBIT A

Charter Application Review Committee Recommendation Report

October 12, 2018

School Name: Journey Academy of Success

Sponsor: ReThink Forward

Proposed Location of School: Metro Nashville Public Schools

Evaluation Team:

Leigh Cummins
Jarett Fields
Ali Gaffey
Grant Monda
Hillary Sims
Jay Whalen

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



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Introduction

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

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

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

Overview of the Evaluation Process

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

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

This recommendation report includes the following information:

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

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

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

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

Rating	Characteristics
Meets or Exceeds Standard	The response reflects a thorough understanding of key issues. It clearly aligns with the mission and goals of the school. The response includes specific and accurate information that shows thorough preparation.
Partially Meets Standard	The response meets the criteria in some aspects, but lacks sufficient detail and/or requires additional information in one or more areas.

Does Not Meet Standard	The response is significantly incomplete; demonstrates lack of preparation; is unsuited to the mission and vision of the district or otherwise raises significant concerns about the viability of the plan or the applicant's ability to carry it out.
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Summary of the Application

School Name: Journey Academy of Success

Sponsor: ReThink Forward

Proposed Location of School: Metro Nashville Public Schools

Mission:¹ To eliminate the false-sense of reality that exists in our media-driven society by providing a healthy, safe, engaged, supported, and challenging environment that will strengthen students academically, socially, and emotionally, resulting in confident students who are positive about learning and excited about possibilities for their future. Students will leave Journey with the skills and mindset necessary to not only face reality but create a better reality for the next generation.

Number of Schools Currently in Operation by Sponsor: 0

Proposed Enrollment:²

Grade Level	Year 1 (2019)	Year 2 (2020)	Year 3 (2021)	Year 4 (2022)	Year 5 (2023)	At Capacity (2024)
Pre-K	32	32	32	32	32	32
K	60	80	80	80	100	120
1	80	80	80	100	120	120
2	80	100	100	100	120	120
3	60	80	100	100	100	120
4	75	75	100	100	100	100
5	75	75	100	100	100	100
6	75	75	75	100	100	100
7	0	75	75	75	100	100
8	0	0	75	75	75	100
Total	537	672	817	862	947	1012

Brief Description of the Application:

ReThink Forward (ReThink) proposes to open a school in Nashville that serves students in pre-kindergarten through 8th grade. The school, Journey Academy of Success (Journey), is a new-start school. The school proposes to locate in the Southeast section of Nashville.³ The school will deliver an educational program in a student-owned learning environment coupled with social emotional supports.⁴

The proposed school will be organized under the existing non-profit entity of ReThink, and the Board of Directors will govern the school. The board will partner with the Noble Education Initiative (NEI) for daily operations of the school. ReThink projects the school will have \$260,540 in revenue and \$260,540

¹ Journey Academy of Success Charter School Application, pg. 4.

² Ibid., pg. 17.

³ Ibid., pg. 1.

⁴ Ibid., pg. 1.



in expenses in year 0, resulting in no ending balance. ReThink projects the school will have \$5,892,879 in revenue and \$5,633,003 in expenses in year 1, resulting in a positive ending fund balance of \$259,876. By year 5, the school projects to have \$9,367,862 in revenue and \$8,924,424 in expenses, resulting in a positive ending fund balance of \$1,668,586.⁵ The school anticipates that 64% of the student population will qualify as economically disadvantaged, 11% of the student population will be students with disabilities, and 43% of the student population will be English Learners.⁶

⁵ Ibid., Attachment O-Planning and Budget Worksheet.

⁶ Ibid., pg. 17.

Summary of the Evaluation

The review committee recommends that the application for Journey be denied because the applicant failed to provide sufficient evidence in the academic, operational, and financial sections to meet the required criteria of the rubric. The academic plan presented by the applicant did not fully address how the school will serve special populations or implement a robust intervention plan. Additionally, the applicant did not provide a comprehensive marketing and recruitment plan to meet the enrollment projections.

The operations plan presented by the applicant lacked written agreements between the governing board and partnership organizations, did not provide sufficient evidence of the governing board's ability to oversee the school, lacked a detailed plan for building or renovating the anticipated facility, and provided inadequate transportation and staffing plans.

Finally, the financial plan presented by the applicant contained an unrealistic startup budget, lacked sufficient funds for transportation or facility costs, had not established a contractual cost for services from NEI, and did not include written agreements with partner organizations.

Summary of Section Ratings

In accordance with the Tennessee Department of Education's charter application scoring rubric, "applications that do not meet or exceed standard in every area...will be deemed not ready for approval,"⁷ and strengths in one area of the application do not negate material weaknesses in other areas. Opening and maintaining a successful, high-performing charter school depends on having a complete, coherent plan and identifying highly capable individuals to execute that plan. The review committee's consensus ratings for each section of the application are as follows:

Sections	Rating
Academic Plan Design and Capacity	Partially Meets Standard
Operations Plan and Capacity	Does Not Meet Standard
Financial Plan and Capacity	Does Not Meet Standard

⁷ Tennessee Charter School Application Rubric – Evaluation Ratings and Sample Scoring Criteria, pg. 1.

Analysis of the Academic Plan Design and Capacity

Rating: Partially Meets Standard

Weaknesses Identified by the Committee:

The applicant's Academic Plan Design and Capacity partially meets the standard because the plan to serve special populations is incomplete, the intervention plan lacks clarity, and the marketing and recruitment plan is insufficient.

The review committee found that the applicant's plans to serve special populations did not provide a clear plan for the provision of required services or staffing. The review committee did not find evidence that the projected number of staff members providing support to students with disabilities would be sufficient to support the academic plan outlined, which relies heavily on push-in and pull-out support in each class. Additionally, the applicant's plan to staff and serve English Learners (EL) was inadequate. The applicant proposed an estimated EL population of 43%, which, based on enrollment projections, would be 231 students in year 1. The applicant did state in the capacity interview that they plan to partner with Trevecca Nazarene University (Trevecca) to ensure all staff members attain EL certification, however, it was unclear exactly how or when that would happen for teachers. The applicant also stated the school would cover the certification costs for teachers, though those costs were not included in the budget. Therefore, it is unclear if the staffing model would give the school enough capacity to support and provide direct services to such a high population of ELs.

The applicant did not provide evidence of a sufficient intervention plan for students. Based on the daily schedule proposed in the application, it was unclear exactly how the Response to Instruction and Intervention (RTI²) plan would be implemented, if there was enough staff capacity, and how all students needing intervention would receive the required number of intervention hours. The applicant stated in the interview that the special education certified teachers would not necessarily be the teachers responsible for RTI², but they did not elaborate on who would be responsible for administering services and what that intervention instruction and support would look like.

Additionally, the applicant was unable to provide the review committee with a sufficient marketing and recruitment plan to ensure full enrollment. The applicant proposes to open with seven grade levels and 537 students in year 1. For an applicant new to Tennessee, the review committee did not find sufficient evidence that there was appropriate on-the-ground support for the startup operations and recruitment of staff and students. While Trevecca does have some structured community meetings planned, most of the governing board members responsible for executing the recruitment plan reside outside of Tennessee. As explained in the capacity interview, only two members of the governing board and no members of NEI live in Nashville. Beyond the support of Trevecca, the applicant provided no clear community and parent demand or engagement plans during the startup year. As a result, the review committee did not find evidence that the applicant can meet the enrollment projections. Additionally, the applicant did not have a clear plan to communicate with families in the area that speak other languages, particularly those other than Spanish.

Strengths Identified by the Committee:

While the Academic Plan Design and Capacity partially meets the standard because of the weaknesses described above, the review committee did find evidence of strengths within the section. Specifically, the applicant outlined an academic plan that was clearly aligned with the school's vision and had an ongoing focus of social emotional learning and support embedded throughout the application.



Additionally, the applicant identified a detailed plan to engage families once the school is in operation and demonstrates a clear intention to provide real-time updates and feedback to parents. The applicant also provided comprehensive student performance goals and promotion criteria that demonstrated thoughtful, student-centered outcomes supported by a robust assessment and data analysis strategy.

Analysis of the Operations Plan and Capacity

Rating: Does Not Meet Standard

Weaknesses Identified by the Committee:

The applicant's Operations Plan and Capacity does not meet the standard because of the lack of written agreements between the governing board and partnership organizations, concerns with the governing board's ability to oversee the school, an incomplete plan for building or renovating the anticipated facility, an inadequate transportation plan, and an insufficient staffing plan.

Perhaps of greatest concern to the review committee was the lack of formal written agreements between ReThink, NEI, and Trevecca. Many of the operations and startup plans described in the application are handled by NEI. During the capacity interview, the applicant elaborated on NEI's role from startup through year 1, which also included financing the operations of the school through funds that do not have to be repaid by ReThink. Once the startup phase is complete, it is unclear what NEI's role would be in the day-to-day operations of the school. While the applicant did outline certain responsibilities NEI would have, there are still gaps regarding who would be responsible for academic tasks including curriculum development and data management. The applicant stated in the interview that they do not have any formal written agreements in place for NEI's services, including when NEI would start receiving payment or how much that payment would be.

Additionally, while the applicant detailed a partnership with Trevecca that included student teachers and initiating their own certification program, there was no formal agreement in place between the two parties. Without formal agreements, there is no evidence of the terms or costs of the proposed relationships and how the school would be impacted if any of the organizations no longer agree to partner.

While the applicant did identify a founding board with a variety of expertise, most of the board members do not live in Tennessee. Additionally, no one on the NEI team lives in Nashville, though, per the application, NEI is assigned to handle the majority of the startup operations. The applicant did not provide sufficient evidence for how the board and NEI would oversee and manage the startup plan and school operations, particularly as a new operator to Tennessee.

This lack of clarity extends to the renovation plan of the proposed school facility. During the interview, the applicant stated that they were in the due diligence period for a \$2 million property in Southeast Nashville. The applicant explained they were exploring renovation options that included either tearing down and rebuilding parts or demolishing the entirety of the existing facility. Based on the current square footage, the applicant stated that the existing facility is not big enough for the school, and the facility would need additional construction to be enlarged. The applicant did not provide sufficient evidence that such large-scale renovations or construction would be completed before the first day of school. Additionally, the applicant did not provide a sufficient contingency plan for locating the school if renovations or construction were not completed in time. No projected costs for any renovations or construction were included in the budget, and although the applicant stated that NEI would cover all renovations and construction, there was no evidence of the terms of this agreement.

The review committee still has many questions about the proposed transportation plan. While the decision to not provide transportation is not disqualifying, the applicant did not provide a sufficient plan to provide transportation for students who may request or require it. In the application, the applicant stated that the targeted student population would require transportation options and described plans to provide bus passes for public transportation. However, the review committee was unclear on how feasible

this solution was for a K-8 school, and there were limited funds budgeted for additional transportation related expenses.

Finally, the staffing plan for the school is insufficient. The applicant does have a desire to remain flexible in order to meet the needs of all students, however, in some instances, particularly for serving special populations, the applicant described getting “as many teachers as necessary.” While this is a sound idea, the proposed budget did not support the addition of multiple staff members should they be deemed necessary. The applicant did not provide a sufficient staff recruitment plan beyond hiring Trevecca graduates and did not elaborate regarding the year 1 staff recruitment plans during the capacity interview. Additionally, the applicant stated a plan to partner with Trevecca to support EL certification for teachers and to create an alternative teacher certification and licensure program through NEI. These plans, while innovative, are not yet in place and would require additional planning, time, state-level approval, and funding that is not included in the budget.

Analysis of the Financial Plan and Capacity

Rating: Does Not Meet Standard

Weaknesses Identified by the Committee:

The Financial Plan and Capacity does not meet the standard because the applicant presented a startup budget that lacked clarity and feasibility, an operating budget that did not have sufficient transportation or facility costs in the budget, no established contractual costs for services from NEI, and no written agreements in place with partner organizations.

The review committee found a lack of clarity for the funding plan for startup and year 1. In the proposed budget included in the application, NEI pledged a \$260,540 no-interest loan to support the school during the startup year.⁸ The proposed budget also included year 1 revenue from a \$740,243 loan, but the written application did not provide any specific details regarding the terms of the loan. In the interview, the review committee asked the applicant to explain the terms for the \$740,243 loan. The applicant explained that, based on recent negotiations between the governing board and NEI, the total amount contributed to the school in the startup year and year 1 from NEI would be a gift of up to \$740,243. The applicant emphasized the contribution would not be a loan, and therefore ReThink would not be required to pay NEI back. This change resulted in a reduction in revenue for the school of \$260,540 in the startup year and year 1, and it was unclear if the applicant could realistically cover all expenses without the additional \$260,540 originally budgeted in the startup year. Based on the proposed budget, the applicant's surplus in year 1 would be eliminated without the additional \$260,540, and the applicant would run a deficit for the first two years of operation. Without any additional documented fundraising, the review committee found insufficient evidence that the committed funds were sufficient to cover operating expenses until the school begins to receive per pupil funds. Additionally, it was unclear what contingencies were in place to cover any additional expenses.

As stated earlier, the applicant has unknown transportation and facility costs that are not included in the budget. The applicant did outline a plan to provide bus passes and also stated that it will continue to monitor student needs to determine if they will provide daily transportation. Currently, there are limited funds allocated in the budget for transportation costs, and the applicant did not present a contingency plan to finance a more robust transportation program. Additionally, the applicant is pursuing a facility that would require renovations and additional construction. The applicant stated in the interview that any facility funding would not be included in NEI's initial \$740,243 commitment but that NEI will work with the governing board to cover any additional facility costs. However, the applicant could not yet determine the costs of additional facility improvements, and there was no contractual commitment of NEI's responsibility to cover the additional costs.

Finally, the cost for NEI's services is not defined in the operating budget, and there was no formal contractual agreement between the applicant and NEI. The applicant stated in the interview that NEI would not be paid in the startup year, but that the applicant and NEI had not come to a contractual agreement about the costs for NEI's services. In the interview, a representative from NEI stated that agreeing on a cost for services would depend on the school's financial health and how much they are able to pay from the school's budget. With no defined terms for NEI's services or a defined cost, the review

⁸ The application contained a letter of support from NEI which stated the organization pledged a \$250,000 no-interest loan to support the school's startup operations. This amount conflicted with the proposed budget where a \$260,540 sponsorship was listed.



committee was unable to assess the financial impact of the relationship on the school's budget. Additionally, the review committee noted a potential conflict of interest with NEI operating the school and providing full financial support. It is also unclear how long NEI would be able to provide services and startup funding for the applicant without getting paid.

Given these issues, the review committee found insufficient evidence that the applicant's budget was appropriate, realistic, and viable or that the applicant could adequately secure the funding needed to support the school's operation.



Evaluation Team

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

Jarett Fields is an Assistant Principal for a Performing Arts Charter School. Prior to that role, he led a federal grant program for low-income, first-generation students at Beloit College. His work with charter schools began almost ten years ago working with elected officials. Eventually, Mr. Fields led charter school authorizing for the City of Milwaukee and now serves on the National Advisory Board for the National Association of Charter School Authorizers (NACSA). After completing NACSA's Leaders Program, Mr. Fields began consulting with charter schools and charter school authorizers around the country.

Ali Gaffey serves as the Deputy Director of Charter Schools for the Tennessee State Board of Education. In this role, she works on the charter school appeals process and authorization duties of the State Board. Prior to joining the State Board staff, Ali was the 7th and 8th grade Academic Dean at STEM Prep Academy, a charter school serving our largely immigrant population in Southeast Nashville. Ali is a former middle and high school English teacher and Teach For America alum. Ali has taught and led in charter schools in Nashville and New Orleans and loves the innovation opportunities charter schools provide. Ali earned her B.A. at the University of Florida.

Grant Monda is in his fourth year with Aurora Collegiate Academy, currently serving as its Executive Director. Aurora is a tuition- free public charter elementary school serving students from all over Shelby County. Grant joined Aurora after completing the prestigious Ryan Fellowship in 2015. In addition to his work at Aurora, Grant has previously taught in Memphis City Schools and served as a district level coach and evaluator with Shelby County Schools. Grant has also reviewed charter applications for the state and Shelby County Schools. He holds a Bachelor of Arts degree from Rhodes College and a Master's in Education from Christian Brothers University.

Hillary Sims has been a founding member of several Tennessee Charter Schools beginning shortly after the passing of Chapter 13. She holds a Bachelor's of Science in Psychology & Sociology from East Tennessee State University, a Master's of Science in Holistic Teaching and Learning from the University of Tennessee, Knoxville, and an Education Specialist Degree in Comprehensive and Modified, K-12 Special Education from the University of Tennessee, Knoxville. Ms. Sims holds endorsements in six highly qualified subject areas in both Tennessee and Georgia. Having taught in traditional public and private schools as well as served as a School Administrator for greater than 10 years, Ms. Sims brings a broad scope of school



academics, culture, operations and governance. Ms. Sims has contributed to charter school improvement across the United States while working for a global charter management organization. Ms. Sims has served on the Governor's Advisory Council for Students with Disabilities as well as served as a charter review team member for the State Board of Education for the last five years.

Jay Whalen serves as an Education Consultant with the Office of Charter Schools at the North Carolina Department of Public Instruction. Prior to this role, Jay served as the Deputy Director of Charter Schools for the Tennessee State Board of Education and Data Analyst at KIPP Nashville, a charter school organization operating multiple schools in Metro Nashville Public Schools. Jay is a former high school social studies teacher, spending time in both rural and urban Title I public schools, and has also done consulting work for the Tennessee Department of Education. He holds Bachelor of Arts degrees in Secondary Education and History from the University of Rhode Island.

Exhibit B

Metro Nashville Public Schools Recommendation Report

Charter School Amended Application Recommendation Report

Submitted By: ReThink Forward

Evaluation Team

Katy Enterline, Coordinator of Talent Management, HR, MNPS

Michelle Doane, Consultant

Dennis Queen, Executive Officer, Charter School Office, MNPS

Mary Laurens Minich, Director, Charter School Office, MNPS

John Thomas, Coordinator, Charter School Office, MNPS

Introduction

Charter schools are public schools operated by independent, non-profit governing bodies that are granted greater autonomy in the areas of curriculum, calendar, staffing, methodology, and pedagogy in return for greater accountability in achieving high quality academic results with their students. In Tennessee, public charter school students are measured against the same academic standards as students in other public schools and are required to use the same state-approved assessments as all other public schools. Charter schools are required to serve all eligible students, with the education of at-risk students being of utmost importance.

Based on a study by the Thomas Fordham Institute and Basis Policy Research, charter schools that exhibit low performance in their first year of operation are less than 1% likely to improve after five (5) years. Therefore, it is the authorizer's responsibility to create and apply a rigorous, fair, and thorough authorization process in order to ensure only those charter schools who can offer and sustain high quality educational options for all students are recommended and approved to open. Metropolitan Nashville Public Schools is interested in charter applicants who demonstrate the capacity to educate the most at-risk students in highly diverse and personalized settings.

Charter schools in Nashville are required to provide appropriate curriculum, aligned professional standards, engaging models of parental and partnership programs, and strategic planning to leverage and grow resources for the school. Schools are held accountable for academic results, responsible school leadership, sound fiscal and operational management and adherence to the laws and rules that govern education in the state of Tennessee.

Evaluation Process

The Office of Charter Schools worked closely with the National Association of Charter School Authorizers (NACSA) to create an evaluation process that embodies best practices from authorizers throughout the country and has gained both statewide and national recognition as rigorous, thorough, fair and impartial.

A core team specifically trained to assess the quality and sustainability of a proposed school reviews each application. In addition, individuals with specific expertise in special education, English Language learners, business and finance, curriculum, facilities and transportation also review each application to provide the needed expertise in those areas. Finally, the review teams also may include community stakeholders and others who have experience and expertise in specialized areas.

The Office of Charter Schools exercises additional oversight of the process.

Evaluation Process

This recommendation report from the Office of Charter Schools is the culmination the three stages of review:

- **Proposal Evaluation** – The evaluation team conducted independent and group assessment of the merits of each proposal against the published evaluation criteria.
- **Capacity Interview** – The evaluation team conducted an interview with the applicant group to provide applicants an opportunity to address questions from the written proposal and to evaluate the applicants' capacity to implement their proposed program effectively and with fidelity.
- **Consensus Conclusion** – The evaluation team came to a consensus regarding whether to recommend the proposal for approval or denial to the MNPS Board of Education.

Rating Characteristics

Meets the Standard – The response reflects a thorough understanding of key issues and alignment within all areas of the proposal – academic, operational, and financial. It shows thorough preparation; presents a clear and realistic picture of how the school expects to operate at a high level; and inspires confidence in the applicant's ability to carry out their plan effectively.

Partially Meets Standard – The response meets the criteria in some respects, but lacks detail and/or requires additional information in one or more areas.

Does Not Meet Standard – The response has substantial gaps in a number of areas and the review team has no confidence the applicant can deliver a high quality educational option to the students in Davidson County.

Evaluation Contents

This evaluation report includes the following:

- **Proposal Overview** – Basic summary of the proposed school as presented in the application
- **Recommendation** – an overall judgment, based on extensive analysis of all evidence presented by the applicants, regarding whether the proposal meets the criteria for approval
- **Evaluation:** Analysis of the proposal is based on four primary areas of plan development:
 - › **Executive Summary** – Provides a comprehensive review of all three major areas of the application with emphasis on the reasons for the recommendation from the review team.
 - › **Academic Plan** – Describes the applicant’s model in regards to curriculum and instruction, assessment, working with at-risk and special populations, goals, discipline and logistics (school calendar, daily schedule, etc.).
 - › **Operations Plan** – Outlines operational support for the academic program, including staffing and human resources, recruitment and marketing, professional development for teachers, community involvement, and governing board structure and membership.
 - › **Financial/Business Plan** – Provides budgeting and financial plans to ensure both initial and on-going fiscal compliance, including budget assumptions, transportation, fundraising, payroll and insurance functions.

Opening a successful, high-performing charter school depends on having a complete, coherent plan. It is not an endeavor for which strength in one area can compensate for weakness in another. Therefore, in order to receive a recommendation for approval, the application must **meet or exceed the standard in all three major areas** of the capacity review.

Proposal Overview

Operator/Applicant - Rethink Forward, Inc.

School Name - Journey to Success

Mission and Vision:

Mission: Journey's mission is to eliminate the false-sense of reality that exists in our media-driven society by providing a healthy, safe, engaged, supported, and challenging environment that will strengthen students academically, socially, and emotionally, resulting in confident students who are positive about learning and excited about possibilities for their future. Students will leave Journey with the skills and mindset necessary to not only face reality but create a better reality for the next generation.

Vision: ReThink Forward and Journey's vision is to inspire and equip a generation of self-directed critical thinkers to influence the world around them.

Proposed Location - Southeast Nashville, somewhere in the Cane Ridge, Overton, Glenciff, Antioch area.

Enrollment Projections (as presented by applicant in the written proposal)

Academic Year	Grades Served	Proposed Number of Students
Year 1 2019-20	Pre-K - 6	537
Year 2 2020-21	Pre K - 7	672
Year 3 2021-22	Pre K - 8	817
Year 4 2022-23	Pre K - 8	862
Year 5 2023-24	Pre K - 8	947
Year 6 2024-25	Pre K - 8	1012
Year 7 2025-26	Pre K - 8	1012
Year 8 2026-27	Pre K - 8	1012
Year 9 2027-28	Pre K - 8	1012
Year 10 2028-29	Pre K - 8	1012
At Capacity	Pre K - 8	1012

Executive Summary

Amended Recommendation from the Review Team:

☐ Authorize

☒ Do Not Authorize

Amended Summary Analysis –

After a thorough review of the Journey to Success written amended application by the core team, along with the Office of Charter Schools, is recommending denial of this application. The reasons for this denial are compelling as the school did not meet standard in any major area – academic, operations, or financial.

Academic

The academic plan continued to be high-level and reflected a lack of expertise in program development and implementation, especially in the areas of Pre-K and special populations. Professional development was mentioned frequently throughout the application; however, the document lacked specifics about the structure, content and outcomes. It was clear that a curriculum had not yet been developed or identified, with the applicant indicating only that they would align texts and materials to Tennessee standards. Additionally, the applicant relies heavily on a partnership with Trevecca Nazarene University (TNU) that does not appear to be fully developed and evidence of which was not adequately provided. While a letter from the TNU President was included, the actual plan was not in the application.

The applicant's plan for Response to Intervention (RTI) lacks an identified progress monitoring tool, and the review team had questions regarding the time used to provide Tier 2 services. Discipline remained an area of concern, as the team found no changes from the original application. No differentiation was indicated in discipline practices across differing grade level tiers.

Operations

Though the applicant amended the governing board to include three former principals, one current teacher and one higher education professional, the review team still felt that it lacked expertise in areas such as law, operations, marketing, and human resources. The vetting process for adding members was unclear, and the hands-off approach during year zero was concerning, as the contract with MNPS would be held with ReThink forward, not NEI.

While the applicant amended the plan to include a facilities description requiring a wide range of square footage, the review team still did not feel the applicant had a realistic view of the real estate market in Nashville and the requirements associated with the start-up of a new school. The applicant did mention working with a real estate professional, but did not mention which one. There was no mention of the potential requirements for a Pre-K supported through DHS certificate funding and how these may differ from TDOE requirements for Pre-K and elementary/middle schools. The plan to rely on TNU for space should a transition time be needed was unclear and unsupported by evidence.

The review team continued to have questions regarding the lack of a school leader and plans for recruitment and retention of teachers. A partnership with TNU was mentioned frequently throughout the application; however, it was unclear how master teachers to serve as mentors for preservice teachers at TNU would be identified.

Due to the population the applicant proposes to serve, lack of transportation continues to cause concern for the review team. Although Tennessee charter law does not require a charter school to provide transportation, ReThink Forward indicated they would target families with children currently at low performing schools who could not access transportation to attend high performing schools. Coupled with the prospect that they anticipate that 90% of students will qualify for either free or reduced meals, this does not seem to be a viable plan for school sustainability, nor does it appear to meet the needs of the families.

Technology and waivers remained concerns for the review team, as well. Though blended learning was described, software was not identified. Several allowable waivers were requested; however, the applicant attempted to reserve the right to request any waivers applicable to charters in the future.

Financial

While the applicant addressed several areas of concern from the original review team, the changes were unclear and caused even more unease for reviewers. Of great concern was the potential conflict of interest in that Sherri Hage, CEO of NEI, the CMO with which ReThink Forward proposed to contract, appears to be the main funding source for the school. This could impact ReThink Forward's ability to provide an objective overview of NEI's performance and could potentially influence the services in which they choose to invest. Furthermore, reliance upon one person as a funding source does not inspire confidence in the school's ability to obtain secure funding.

Summary

The review team agrees that while the applicant did address some of the questions outlined when original feedback was provided, they did not adequately address the concerns raised. In fact, some of the amendments raised additional concerns, indicating the applicant has not shown that they have the capacity to start up a new school in MNPS at this time.

In conclusion, Journey to Success was again unable to provide the review team with a clear, comprehensive, research-based, effective plan for successful instruction of students within MNPS. The operations and financial sections maintained significant errors, lack of detail, and under-preparation by the applicant. Equally troubling to the review team is the reliance of the ReThink Forward sponsor on the CMO, including financial reliance. If approved, MNPS would contract with ReThink Forward and not the CMO, but it is very uncertain, based on current information, if the ReThink Forward team has the capacity to open, run, and sustain a school. It continues to be unclear how the contract with the CMO is structured, as there is no written agreement to date. Taking into account the thorough review of the amended application, an interview with the applicant's leadership team and CMO, and the concern of the MNPS review team that this application lacks significant detail and coherence throughout, the Office of Charter Schools respectfully submits its second request that the MNPS Board of Education deny this application.

Section Summaries

Amended evaluation

Only applicants who score “Meets Standard” in all three major areas on the evaluation rubric are recommended for authorization.

Academic Plan	<input type="checkbox"/> Meets Standard <input type="checkbox"/> Partially Meets Standard <input checked="" type="checkbox"/> Does Not Meet Standard
Operations Plan	<input type="checkbox"/> Meets Standard <input type="checkbox"/> Partially Meets Standard <input checked="" type="checkbox"/> Does Not Meet Standard
Financial Plan	<input type="checkbox"/> Meets Standard <input type="checkbox"/> Partially Meets Standard <input checked="" type="checkbox"/> Does Not Meet Standard

Amended Academic Plan Detail

Rating: Does Not Meet Standard

Summary as Presented in Proposal: ReThink Forward submitted an application for a Pre-K – 8 school in the southeast end of Nashville. They propose to partner with a CMO, Noble Education Initiative (NEI), and with Trevecca Nazarene University (TNU). At capacity, the school would have 1,012 students. The stated vision is to equip a generation of critical thinkers, and to emphasize social-emotional learning. The school intends to improve learning for all students and close the achievement gap between high and low performing students.

Review Team Analysis: The amended application review team determined the application does not meet standard for the academic plan. While the amended application does address a few concerns outlined in the original report of the core team, there still ambiguity surrounding the curriculum, instructional practice, and assessments for grades Pre-K-8. Re-think Forward continues to state that they will use year 0 to develop a more detailed plan for implantation.

The most important characteristic of the academic plan are the assessments. These have not been developed and cannot until a curriculum is identified. This lack of specificity around academic plan leaves reviewers without confidence. As well, the application lists things necessary to an academic plan but still does not provide the specificity necessary for a recommendation of approval.

The review team found additional information regarding the proposed Pre-K curriculum. They noticed the application provided a high level outline but did not provide an actual plan. The application indicated Journey would follow the TN State Standards and provided a link to the TDOE website but applicant did not demonstrate an understanding or knowledge of them. Additionally, the applicant mentions accepting DHS certificates, but references the TDOE standards. DHS and TDOE have two separate Pre-K monitoring processes. It is not clear that the applicant has a grasp of the different requirements set forth by both entities.

During the review of the amended application, the team noticed Journey plans to create an instructional calendar that will be used to guide teachers throughout the school year. From the calendar, curriculum maps would be created to ensure teachers were covering the TN tested standards. It was unclear to the team if NEI or the teachers and school leaders would be creating the calendar and curriculum maps. There was no differentiation made between the grade levels planning and expectations provided in the application.

While the applicant does intend to use their own Academic Design Plan to meet students where they are performing academically, there was little detail surrounding the actual design. The applicant also indicated, “They would connect with parents and community members to help build support for student outside the school day”. However, they provided no details as to the type of support or what the support would look like.

The applicant did state they would use blended learning in grades K-8. The team felt the plan lacked detail to provide a true understanding blended learning. Reviewers were unclear of how the blended model worked in conjunction with the proposed academic model. Also the applicant indicated they would use a software during blended learning time, however it was unclear as to which software they would use or how it would be used during this time.

There was an indication that the partnership between TNU and Journey would benefit the students with the latest educational research. Journey plans to provide tenured teachers that can mentor aspiring teachers from TNU. However, it was unclear if the agreement has been formalized or if there was an alternative plan in case TNU was unable to provide aspiring teachers to Journey. Additionally, it was unclear how tenured or master teachers would be identified and trained to be appropriate mentors.

While Journey indicated short term goals set for students by teachers, it was unclear to the team how they would monitor and revise goals. During the first review cycle, the team noticed a corrective action plan had not been presented. The applicant indicated a plan would be created if Journey fell below the state and/or the district, however there was little to no detail of an actual plan.

As noted in the original recommendation report, the team had concerns regarding the application’s detail around special populations. While additional information was added to address this specific question, the review team remains apprehensive regarding Journey’s capacity and understanding of the federal and state requirements around students with a disability, gifted students, and EL students. The application indicated that classroom teachers would be trained to understand the modification indicated by the IEP. The professional development would be conducted by the Student Services Coordinator, ESE Coordinator, and/or the schools administration team. There was no indication of how the services would actually be delivered. This was especially concerning to the team for students who may need pull out services.

The application indicated that EL students would be taught by a certificated EL teacher and would receive support through being immersed in the classroom. It was still unclear to the team how the student would be receiving their required amount of EL services based on their tier level. It was also unclear if during the immersed classroom

experience, the EL certificated teacher would be teaching both EL and English speaking students or just EL students.

When identifying a student as gifted, the applicant indicated they would conduct a meeting to review data and collect information through a questionnaire. However, it was unclear if an IEP would be created to outline the services that needed to be provided to the student. While project-based learning was a strategy outlined to address the needs of gifted students, there was no indication of increased rigor of instruction. Again, it was unclear to the team how the services indicated would support the needs of the students.

RTI was another concern indicated on the original recommendation report. While the applicant did indicate how students would be grouped together and receive the RTI services, the review team still had concerns that a monitoring tool was not identified. Additionally, it was indicated that students would receive tier 2 intervention services during enrichment time which would include: Technology, Music, Art, PE, and Foreign Language. The application indicated they would offer after school and Saturday tutoring free to students beginning in September. However, transportation would not be provided.

The application review team found no changes from the original application regarding discipline plan. This was concerning to the team since no differentiation was indicated in discipline practices across Pre-K – grade 8. Again, the applicant discussed using restorative practices; however, the handbook actually describes a plan more punitive in nature. The expulsion plan does not align with the state nor MNPS policy.

The applicant did add information indicating the print, radio, news stations, and social media strategies they would use as marketing tools. The applicant also indicated they conducted a survey where 89% of the parents were interested in a new school. However, the actual instrument was not included in the amended application and the team was unclear as to the number of parents participating and the validity of the responses.

In summary, while the applicant added additional information, the review team still had concerns and felt the academic plan was still lacking evidence that ReThink Forward would have the capacity and the ability to operate Journey to Success to be a high-quality institute as those already in MNPS. It appears ReThink Forward, the applicant and entity that MNPS would be contracting with, relied on the CMO to gather information and make changes.

Amended Operations Plan Detail

Rating: Does Not Meet Standard

Summary as Presented in Proposal: The application lists a five-member board that would act as the governing board during the first year of operation. They proposed that the board serve a one-year term. The applicant indicated a location within the Cane Ridge, Antioch, Glenclyff and/or Overton area, and has indicated they will not provide transportation, with the exception of required special education and McKinney-Vento transportation. By-laws indicate governing board members will serve one year.

Amended Review Team Analysis: The Operations Plan does not meet standard because it lacks significant detail and the review team cannot appropriately assess the ability of the plan to support the academic outcomes.

ReThink Forward is now comprised of a board including, 3 former principals, 1 current teacher, and 1 higher education professional. Since the board's experience is centered in the field of education, the review team had concerns related to the board's capacity in other areas, particularly law, operations, marketing, and human resources. ReThink forward does have plans to divide the governing board into three committees focusing on financial health, operational efficiency, and academic performance. While the founding board plans to be the governing board through opening, the vetting process associated with adding additional members and what qualifications they would be seeking to add to the governing board. Additionally, ReThink Forward plans to take a hands off approach, leaving the day-to-day operations the CMO. This is cause for concern, especially during the first year of operation, since ReThink Forward would be the one holding the contract with MNPS, not the CMO.

The applicant will rely on the CMO to provide annual monitoring and evaluation updates to the board on the school's leadership team performance. At that time, the CMO will make recommendations to the board regarding next steps with the administration. The applicant indicated that if the board disagrees with the recommendation, it is up to the CMO to assure ReThink Forward they are doing what is best for the students. At this time, it is unclear as to next steps if the disagreement cannot be resolved between ReThink Forward and the CMO. The plan only indicated that the information would be passed on to the board annually, causing the review team to question why there was not a more comprehensive review plan that required reporting throughout the year. In addition, the original review committee had concerns surrounding the stability of the governing board since they are proposing a one year term. The only addendum the applicant put in place was the governing board would conduct a review at the end of the first year. The review team did not feel this addressed the lack of oversight needed.

The applicant indicated they would rely on the CMO and their experience to address all anticipated challenges (hiring, facility, community engagement, etc.). However, it is unclear at this time if the CMO has opened a new school from the first day.

While the applicant did include a wide range of square footage (50,000 to 90,000) and the number of classrooms needed to meet the requirements for operating a school, it is unclear if they plan to start at 50,000 and then be at 90,000 square feet at capacity. The review team was unsure how the applicant arrived at the wide range of square footage. Considering the current real estate market, the review team did not feel confident that the applicant could secure a facility if they waited until after an approval to begin looking for a location for the school. While the applicant provided a timeline, it was a very tight timeline that could be considered unrealistic. They also mention TNU would provide conference space to the school during construction. It was unclear if TNU had facilities that would meet the state compliance requirements for all grade levels including Pre-K. Additionally, there were questions regarding the funding that would be needed to secure the space or make any needed modifications until a transition to permanent building could be made.

The original review committee expressed concerns because a school leader had not been identified at that time. In 2007, The Center for Research on Educational Outcomes (CREDO) reported that the lack of a named leader during the charter application process is a major risk factor for new charters that review teams should consider. The applicant indicated they would rely on the expertise of ReThink Forward, NEI, and TNU to develop a leader to be successful at Journey. The review team remains unconvinced of the applicant's ability to recruit and retain a strong school leader.

The applicant did indicate they would use specialized head hunter sourcing and university partnerships to recruit for hard to fill positions. It was unclear to the review team which head hunter source they would use and what other universities would they be partnering with since they only indicate a partnership with TNU. Again, ReThink Forward indicated NEI had a proven track record for hiring, training, and developing high-performing school leaders. Evidence of this type of work in other successful charter schools was not provided.

As stated in the original recommendation report, the applicant does not intend to provide transportation, and there is no comprehensive plan to ensure students can get to school. Although Tennessee charter law does not require a charter school to provide transportation, ReThink Forward indicated they would target families with children currently at low performing schools who could not access transportation to attend high performing schools. This seemed contradicting to the review team. Also, ReThink forward is proposing to recruit 537 students during the first year of operation, causing review team to maintain doubts regarding the applicant's understanding of the area in

which the school will be located and the complexities of recruitment for a start-up charter school.

The applicant did attempt to address the concerns about the technology plan. They indicated technology would be available in three areas of the students' career at Journey: to encourage students to create original works, to collaborate with peers, and to do original research. While the applicant provided a broad overview of the availability of technology to students and teachers, a concrete plan was not provided. This concerned the review team since a large amount of funding is designated to technology.

The applicant added several waivers which are allowable. However, they indicated they wanted to reserve the right to request any and all waivers applicable to charters in the future. This is not permissible since all waivers must be included in the contract when it is created.

Amended Financial/Business Plan Detail

Rating: Does Not Meet

Amended Summary as Presented in Proposal: The proposed budget assumes \$9552 per-pupil and is based on a first year enrollment of 537 in grades Pre-K – 6. The assumptions do not include any grants in year one. It does however include a \$200,000 personal loan from Sherry Hague, CEO of NEI. The school assumes participation in all Federal Title funds, and plans to pursue a variety of grant opportunities after the first year of operation. Average teacher salaries are assumed at \$45,000 per year, with a 2% per year increase. ReThink Forward will contract with NEI for management services.

Amended Review Team Analysis: The financial plan does not meet standard. While the applicant address several areas of concern of the original review team, the changes were unclear and were cause for even more unease for the review team. The review team is not confident that the financial plan will support and sustain the schools.

The review team noticed the applicant added a letter from Sherry Hage, CEO of NEI indicating she would provide ReThink Forward with a personal loan in the amount of \$200,000 in year 0. As ReThink Forward indicated a good faith contract with NEI to be the CMO for Journey, the team felt this would be a conflict of interest. Furthermore, the review team noticed a letter which appeared as a line of credit from UBS Financial Service Inc. to Sherry Hage, CEO of NEI in the amount of \$1,300,000. However, the team learned that it was not an actual line of credit but a security account comprised of securities, mutual funds and other non-deposit investments products. The letter indicated the funds located in this account can fluctuate according to the market, as well as be transferred from the account or withdrawn. Since Mrs. Hage is the CEO of NEI and entering into a contract with ReThink Forward, this could again be deemed as a conflict of interest. Also, with the possibility of the funds being able decrease or be totally withdrawn, the review team felt this was unable to be used as an acceptable line of credit. In addition, this could impact ReThink Forward's ability to provide an objective review of NEI performance.

In year 1 the applicant budgeted \$86,526 for financial services. This amount increased to \$597,072 in year 5. While the applicant did indicate this amount included NEI management fee, authorizer fee, and repayment of the initial \$250,000 personal loan from Sherry Hage, the review committee felt the other expenditures were vague at best.

The description of Pre-K funding also caused the review team pause. The application proposes utilization of DHS certificates to provide funding for families who wish to attend the school. There does not appear to be a plan to accept children whose families

do not qualify for DHS certificates, nor does the plan provide a sliding scale for families who may not receive total tuition coverage. In order to provide services for children receiving DHS certificates, DHS childcare guidelines must be followed. There does not appear to be any plan for meeting these requirements, as they differ from those of TN Voluntary Pre-K. There are no plans outlined for blending and braiding of any Pre-K services, and the review team felt that the applicant did not have a full understanding of the different types of Pre-K providers in Tennessee.

The applicant indicated they would secure state and federal funds such as Title I, Title II, Title III, Title IV, and IDEA. It was unclear to the review team if the applicant investigated to determine the funding flow from the federal government to the state to the district and the current formulas to project state and federal funds going forward.

When comparing the budget narrative to the actual budget, it was unclear to the review team if the number of required EL teachers to support the needs of the number of EL projected students has been adequately funded.