
BEFORE THE TENNESSEE STATE BOARD OF EDUCATION

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) **State Board of Education Meeting**
) **September 21, 2020**
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IN RE:
Ivy Prep Academy
Charter School Appeal

**FINDINGS AND RECOMMENDATION REPORT
OF THE EXECUTIVE DIRECTOR**

Pursuant to Tennessee Code Annotated (T.C.A.) § 49-13-108, Sponsors proposing to open a new charter school may appeal the denial of their amended application by a local board of education to the State Board of Education (State Board). On July 24, 2020, the Sponsors of Ivy Prep Academy (IPA) appealed the denial of its amended application by the Metropolitan 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 IPA amended application was not “contrary to the best interests of the students, LEA, or community.”¹ Therefore, I recommend that the State Board affirm the decision of MNPS to deny the amended application for IPA.

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 conducted a de novo, on the record review of the IPA 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

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. Due to the public health emergency, the public hearing was held virtually.

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 amended charter application was contrary to the best interests of the students, local education agency (LEA), or community.⁴ Because IPA 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. The Sponsor of IPA submitted a letter of intent to apply for a charter school to MNPS on November 14, 2019.
2. The Sponsor submitted its initial application for a school serving grades 5-8 to MNPS on February 3, 2020. MNPS assembled a review committee to review and score the IPA application.
3. MNPS's review committee held a capacity interview with the Sponsor on March 31, 2020.
4. MNPS's review committee reviewed and scored the IPA initial application. A report was presented to the MNPS Board of Education regarding the review committee's ratings; however, neither the review committee nor the MNPS staff made a recommendation to the MNPS Board of Education to either approve or deny the initial application.
5. On April 28, 2020, the MNPS Board of Education voted to deny the IPA initial application.
6. On May 29, 2020, the Sponsor submitted the IPA amended application to MNPS.
7. MNPS's review committee reviewed and scored the IPA amended application. Again, a report was presented to the MNPS Board of Education regarding the review committee's ratings; however, neither the review committee nor the MNPS staff made a recommendation to the MNPS Board of Education to either approve or deny the amended application.
8. On July 14, 2020, the MNPS Board of Education voted to deny the IPA amended application.
9. IPA appealed the denial of the amended application in writing to the State Board on July 24, 2020, including submission of all required documents per State Board policy 2.500.
10. At the time of appeal to the State Board, the Sponsor initially submitted proposed corrections pursuant to T.C.A. § 49-13-108(b)(4), but later withdrew the corrections to the application.
11. On July 27, 2020, the State Board staff sent a request for information to MNPS and the Sponsor.

⁴ Ibid.

12. The State Board’s review committee independently analyzed and scored the IPA amended application using the Tennessee Department of Education’s charter application scoring rubric.
13. On August 26, 2020, the State Board staff held a virtual public hearing. At the public hearing, the executive director, sitting as the State Board’s designee, heard presentations from the Sponsor and MNPS and took public comment regarding the IPA application.
14. On August 28, 2020, the State Board staff sent a second request for information to MNPS.
15. The State Board’s review committee conducted a capacity interview with the governing board of IPA and key members of the leadership team on August 31, 2020. Due to the COVID-19 public health emergency, the capacity interview was held virtually.
16. After the capacity interview, the State Board’s review committee determined a final consensus rating of the IPA amended application, which served as the basis for the Review Committee Recommendation Report, attached hereto as **Exhibit A**.

FINDINGS OF FACT

- **District Denial of Application.**

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

Name	Title or Area of Expertise
Katy Enterline	Director of Talent Management, HR, MNPS
Daniel Killian	Director Exceptional Education of Fiscal State Reporting and Monitoring, MNPS
Dr. Alyson Lerma	Director of Grant Management, MNPS
Michelle Doane	Consultant
Ricky Caldwell	Exceptional Education Coach, MNPS
Dr. Joseph Gordon	Coordinator of School Counseling Services, MNPS
Dr. Matthew Nelson	Director, Advanced Academics Talent Development, MNPS
Alyssa Udovitsch	English Learner Coach, MNPS
Todd Wigginton	Director of Instruction, Elementary, MNPS
Dr. Jennifer Berry	Director of STEAM Science, MNPS
Ashley Montgomery	Consultant

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

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

In totality, the MNPS review committee recommended denial of the IPA initial application. The MNPS review committee’s recommendation was presented to the MNPS Board of Education on April 28, 2020. Based on the review committee’s recommendation, the MNPS Board of Education voted to deny the initial application of IPA.

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

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

Again, in totality, the MNPS review committee recommended denial of the IPA amended application.⁵

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 July 14, 2020. Based on this recommendation, the MNPS Board of Education voted to deny the amended application of IPA.

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

Following the denial of the IPA amended application and subsequent appeal to the State Board, State Board staff assembled a diverse review committee of internal and external experts to independently evaluate and score the IPA amended application. This review committee consisted of the following individuals:

Name	Title
Sam Brobeck	Associate Consultant, Education Resource Strategies
Binh Doan	Director of Operations, Aurora Collegiate Academy
Chad Fletcher	Federal Programs Supervisor, Bedford County Schools
Nate Parker	Coordinator of Policy & Federal Programs, State Board of Education
Hillary Sims	Exceptional Education Coach, Metropolitan Nashville Public Schools
Robert Wallace	Director of Operations, KIPP Antioch College Prep Elementary

The State Board review committee conducted an initial review and scoring of the IPA 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 State Board review committee’s consensus rating of the IPA amended application was as follows:

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

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

The State Board review committee recommended denial of the application for IPA because the Sponsor failed to provide sufficient evidence in the academic, operational, and financial sections of the application to meet the required criteria of the rubric.

The review committee found the IPA academic plan partially meets the standard of the rubric. The committee identified several strengths in the academic plan, including a founding team with vast experience and knowledge working in the community they wish to serve, a compelling mission and vision for the school, and a family and community engagement plan that thoroughly engaged parents in leadership opportunities. However, the review committee noted several weaknesses in the academic plan which resulted in the section failing to meet the standard for approval. The IPA application lacked a comprehensive academic plan that adequately explained how all parts of its proposed three-tiered model would be implemented. Additionally, the IPA application did not provide a comprehensive RTI² plan that aligns with Tennessee requirements. Finally, the plan did not sufficiently describe how the school would serve its special populations.

Next, the review committee found the IPA operations plan also partially meets the standard of the rubric. The Sponsor showed a strong understanding of the responsibilities of its governing board and provided a robust professional development plan for staff. However, the IPA application did not provide a comprehensive start-up plan with a realistic budget. In addition, the Sponsor lacked a convincing plan to secure and prepare a facility for staff and students prior to the start of the school year. Lastly, the Sponsor failed to provide a comprehensive plan for staffing its career pathways and arts programs, which are central to its academic model.

Finally, the review committee found the IPA financial plan does not meet the standard of the rubric because it lacked a complete, realistic, and viable start-up and five-year operating budget. The budgeted amount provided for Year 0 is insufficient to support the work outlined in the start-up year, and the Sponsor plans on starting Year 1 with only \$300 cash on hand. Furthermore, the financial plan lacks developed contingency plans should any setbacks occur with its proposed facilities plan, meeting its enrollment targets or fully hiring its staff. Each of these concerns amounted to a lack of compelling evidence of a sound financial plan for the school.

For additional information regarding the review committee’s evaluation of the IPA amended 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 was held virtually on August 26, 2020. MNPS's presentation at the public hearing focused on the deficiencies found by the MNPS review committee in the academic, operations, and financial sections of the IPA amended application. Specifically, MNPS outlined concerns with the academic plan, stating that the application did not sufficiently support the curricular choices with research. Additionally, the IPA application did not include clear instructional strategies, including how the school would support students with disabilities. MNPS also outlined concerns with the school's plan to use college students, volunteers, and business partners for key components of the application that are vital to the school's success. Additionally, MNPS argued that the school was unable to meet the standard for approval in the operations section of the application because the application lacked a viable plan to hire and retain teachers given the extra duties described in the application without any additional pay. MNPS also noted that the school planned to obtain a loan to cover startup costs, but the application included no details on how that loan would be repaid. Again, MNPS highlighted the IPA plan to utilize college students to teach classes and serve in internships at the school left many unanswered questions as to how this would actually work. With regard to the finance section of the IPA application, MNPS again noted the proposed teacher salaries were not competitive with MNPS when taking into account the additional duties required of IPA teachers, and that the application contained several areas of misalignment between the budget and the staffing plan and lacked a clear plan for who would oversee the school's finances. MNPS also presented information outlining what it deemed to be the financial impact of IPA on the district. In response to questions from State Board staff, MNPS highlighted concerns with the proposed location of the school, stating that schools in the proposed community are underutilized, which has recently resulted in the district closing and combining schools in the area due to low enrollment.

In response to MNPS, IPA's Sponsor highlighted a strong desire to provide a quality school option in the north Nashville area, noting this area has the highest incarceration rate in the country, is 90% minority, and only 5% of students are reading on grade level. The Sponsor outlined the plan to focus on career exploration, prepare 100% of students with skills to close the achievement gap, and hire a diverse faculty. IPA's Sponsors noted they should not be faulted for not having access to a Charter Management Organization (CMO) or funding, and that not approving the school would be a detriment to the North Nashville community. In response to questions from State Board staff regarding how the school's plan will best serve the target population, the Sponsors noted that their chosen curriculum is research-based, on grade level, and will be supported by board members with a depth of knowledge in education. Additionally, the Sponsors described how they plan to employ social-emotional learning throughout the day to help students manage their behavior. When asked how declining enrollment in the North Nashville area would affect the school's enrollment plans, the Sponsor argued that enrollment is declining because the schools in the area are failing and parents are pulling kids out of the schools. They argued charter school enrollment is increasing and that they want to provide parents a choice. Regarding the facility search, the Sponsor outlined two (2) potential options under consideration, including a school building within a church and exploration of a partnership with Tennessee State University for a temporary location. Finally, the Sponsors answered questions regarding the low amount of budgeted expenses in the start-up

⁶ T.C.A. § 49-13-108(b)(4).

year. In response, the Sponsor noted all staff had committed to not taking a salary in the planning year, and they would not have to pay any rent on a facility until the school's first year in operation.

A portion of the public hearing was dedicated to taking public comment. Two (2) comments in support of the school were submitted and read into the record at the public hearing. No additional public comments were received after the hearing.

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

State Board staff collected and analyzed information regarding MNPS's application review process to determine alignment with State Board Quality Authorizing Standards as set forth in State Board policy 6.111. At the public hearing, MNPS presented information regarding its application process and alignment to the Quality Authorizing Standards. MNPS articulated that they recruit and train internal and external experts to participate in the review committee and host a capacity interview with the applicant to ensure a fair review. A review committee report is created, based off this review, and sent to the MNPS board of education for consideration.

While the review committee process outlined by MNPS appears in alignment with State Board Quality Authorizing Standards, MNPS fell short in terms of the process employed after the review committee's report on the IPA application was presented to the board. T.C.A. § 49-1-108(a)(3) and State Board rules 0520-14-01-.01 and .02 require that a local board of education provide a written notification to the charter school sponsor of the objective reasons for denial of the application. The local board of education is required to file this written notification with the Department of Education, and the Sponsor must submit copies of the letters notifying them of the reasons for denial to the State Board upon appeal. Additionally, State Board Quality Authorizing Standard 2(b) requires that authorizers implement fair, transparent procedures that "communicates. . . approval criteria, and decisions clearly to the public" and "Informs applicants of their rights and responsibilities and promptly notifies applicants of approval or denial, while explaining the factors that determined the decision so that applicants can decide if they wish to revise their plans based in part on that information and resubmit in the future." While MNPS did provide IPA with a letter outlining reasons for denial of the initial and amended applications, MNPS sought to assert additional reasons for denial not outlined in the letter. Specifically, at the public hearing, MNPS submitted evidence regarding the financial impact that IPA would have on MNPS if approved. While information regarding fiscal impact⁷ of the school was discussed at the July 14 board meeting, it was not clearly listed as a reason for denial either in the motion to deny the school's application that was approved by the MNPS Board, the minutes of the board meeting, or in the letter provided to IPA after the board's vote.

As stated in the Quality Authorizing Standards, it is necessary to ensure a fair, transparent process, that an authorizer make the reasons for denial clear to the applicant so that they may revise and resubmit

⁷ While fiscal impact was generally discussed at the meeting, it does not appear that the board found "substantial negative fiscal impact" pursuant to T.C.A. 49-13-108(c) and State Board Rule 0520-14-01-.02. As such, a separate substantial negative fiscal impact analysis was not conducted pursuant to State Board Rule 0520-14-01-.02 and State Board policy 2.500.

their application in the future, and so that all parties are aware of the reasons for denial should the school choose to appeal the local board's decision. I strongly urge MNPS to revisit its process to ensure that the board votes on a clear resolution regarding the specific, objective reasons for denial of the initial and amended applications, and that the letters notifying the Sponsor of those reasons clearly state all of the reasons for denial included in the board's resolution denying the application.

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 contrary to the "best interests of the students, LEA, or community."⁸ 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 State Board review committee's report, the documentation submitted by both the Sponsor and MNPS, the arguments made by both parties at the public hearing, and the public comments received by State Board staff and conclude as follows:

The State Board review committee's report and recommendations are thorough, citing specific examples in the application and referencing information gained at the capacity interview in support of its findings. For the reasons explicated in the report, I agree that the IPA amended application did not rise to the level of meeting or exceeding the standards required for approval.

It is readily apparent that the Sponsor has a passion for students and dedication to the community they wish to serve. However, I agree with the review committee's assessment that the application lacked sufficient detail in the academic, operations, and financial sections of the application necessary to merit approval. Specifically, the IPA application lacked a comprehensive academic plan that adequately explained its model, complied with requirements relating to RTI², and did not sufficiently outline how it would serve students with special needs. Additionally, the operations plan did not meet the standard because the Sponsor did not provide a comprehensive start-up plan with a realistic budget. In addition, the Sponsor lacked a convincing plan to secure and prepare a facility for staff and students prior to the start of the school year or to ensure proper staffing to implement the proposed plan. Finally, the financial plan proposed in the IPA application did not meet the standard as IPA lacked a complete, realistic, and viable start-up and five-year operating budget. The budgeted amount provided for Year 0 is insufficient to support the work needed in the start-up year, and the Sponsor plans on starting Year 1 with only \$300 cash on hand. Furthermore, the financial plan did not include sufficient contingency plans should any setbacks occur with IPA's facilities plan, meeting its enrollment targets or fully hiring its staff.

Again, I applaud the Sponsor's passion and desire to serve the students in the North Nashville community who are undoubtedly in need of a quality school option, however, the Sponsor has not yet developed a comprehensive plan to merit approval at this time. 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,

⁸ T.C.A. § 49-13-108.

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. The charter school application must be fully developed and ready to be implemented as soon as approval is granted. While it is inevitable that adjustments may need to be made to accommodate the reality of opening a new school, to merit approval, the charter application must instill confidence that the Sponsor has the planning, funding, and capability to weather unforeseen obstacles to ensure success.

Therefore, because the IPA amended application did not meet the standard for approval in the academic, operational, or financial sections of the state rubric, I cannot recommend that the State Board approve the IPA amended application.

CONCLUSION

For these reasons, and for the reasons stated in the Review Committee Report attached hereto as **Exhibit A**, I do not believe that the decision to deny the amended application for Ivy Prep Academy was contrary to the best interests of the students, the LEA, or the community. Therefore, I recommend that the State Board affirm the decision of the MNPS Board of Education to deny the amended application for Ivy Prep Academy.



Dr. Sara Morrison, Executive Director
State Board of Education

9/16/2020

Date



EXHIBIT A

Charter Application Review Committee Recommendation Report

September 14, 2020

School Name: Ivy Prep Academy (IPA)

Sponsor: Ivy Prep Academy, Inc.

Proposed Location of School: Metropolitan Nashville Public Schools (MNPS)

Evaluation Team:

Sam Brobeck
Binh Doan
Chad Fletcher
Nate Parker
Hillary Sims
Robert Wallace

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



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Introduction

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

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

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

Overview of the Evaluation Process

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

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

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

This recommendation report includes the following information:

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

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

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

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

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.

Summary of the Application

School Name: Ivy Prep Academy (IPA)

Sponsor: Ivy Prep Academy, Inc.

Proposed Location of School: Metropolitan Nashville Public Schools (MNPS)

Mission:¹ Our mission is to prepare 100% of our students with the foundational skills they need for acceptance into one of the top colleges or universities in the country and provide them with the knowledge they need to pursue a pathway to a career, entrepreneurship or the workforce immediately following high school. We believe that personalized learning paired with traditional education can close the achievement gap for all students no matter their race, class, background and/or academic history.

Number of Schools Currently in Operation by Sponsor: 0

Proposed Enrollment:²

Grade Level	Year 1 (2021)	Year 2 (2022)	Year 3 (2023)	Year 4 (2024)	Year 5 – At Capacity (2025)
5	75	85	90	95	100
6	75	85	90	95	100
7	0	85	90	95	100
8	0	0	90	95	100
Total	150	255	360	380	400

Brief Description of the Application:

Dr. Katrina Frazier, the applicant and proposed executive director, is proposing to open a middle school in Nashville, TN³ and serve students in grades 5 through 8, specifically in the Whites Creek area of North Nashville. The school, IPA, is a new-start school and plans to employ a three-tiered model integrating rigorous instruction, personalized learning, and social emotional education. The personalized learning component includes career pathway classes and fine arts or applied arts classes.⁴

The proposed school will be organized under Ivy Prep Academy, Inc. as their sponsoring organization. The applicant projects the school will have \$20,000 in revenue and \$19,700 in expenses in Year 0, resulting in a positive ending balance of \$300. In Year 1, the applicant projects the school will have \$1,998,331 in revenue and \$1,941,459 in expenses, resulting in a net income of \$56,872 and a positive

¹ Ivy Prep Academy amended application, pg. 10.

² Ibid. pg. 24-25.

³ Ibid. pg. 10.

⁴ Ibid. pg. 10.



ending fund balance of \$57,172. By Year 5, the school projects to have \$4,107,144 in revenue and \$3,356,508 in expenses, resulting in a net income of \$750,636 and a positive ending fund balance of \$1,990,563.⁵ The school anticipates that 70% of the student population will qualify as economically disadvantaged, 10% of the student population will be students with disabilities, and 4% of the student population will be English Learners.⁶

⁵ Ibid. Attachment O-Planning and Budget Worksheet.

⁶ Ibid. pg. 25.



Summary of the Evaluation

The review committee recommends denial of the application for IPA because the applicant failed to provide sufficient evidence in the academic, operational, and financial sections that the application meets the required criteria of the rubric.

First, the applicant's Academic Plan Design and Capacity partially meets standard. The committee identified several strengths in the academic plan, including a founding team with vast experience and knowledge working in the community they wish to serve, a compelling mission and vision for the school, and a family and community engagement plan that thoroughly engaged parents in leadership opportunities. The proposed founder and her founding team clearly have an undeniable desire to serve the students of Nashville. However, the committee noted several weaknesses in the academic plan which resulted in the section failing to meet the standard for approval. First, it lacked a comprehensive academic plan that adequately explained how all parts of its proposed three-tiered model would be implemented. Additionally, the application did not provide a comprehensive Response to Instruction and Intervention (RTI²) plan that aligns with Tennessee guidance. Finally, the plan did not sufficiently describe how the school would serve its special populations.

Next, the applicant's Operations Plan and Capacity also partially meets standard. The applicant showed a strong understanding of the responsibilities of its governing board and provided a robust professional development plan for staff. However, the applicant did not provide a comprehensive start-up plan with a realistic budget. In addition, the applicant lacked a convincing plan to secure and prepare a facility for staff and students prior to the start of the school year. Lastly, the applicant failed to provide a comprehensive plan for staffing its career pathways and arts programs, which are central to its academic model.

Finally, the Financial Plan and Capacity does not meet standard because it lacked a complete, realistic, and viable start-up and five-year operating budget. The budgeted amount provided by the applicant for Year 0 is insufficient to support the work outlined in the start-up year, and the applicant plans on starting Year 1 with only \$300 cash on hand. Furthermore, the financial plan lacks developed contingency plans should any setbacks occur with its proposed facilities plan, meeting its enrollment targets, or fully hiring its staff. Each of these concerns amounted to a lack of compelling evidence of a sound financial plan for the school. For all of these reasons, the review committee is unable to recommend approval of the application.

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,

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



coherent plan and identifying highly capable individuals to execute that plan. The review committee's consensus rating for each section of the application are as follows:

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

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 standard because it lacked a focused, comprehensive academic plan that adequately explained how its proposed three-tiered model would be implemented. Also, there was a lack of evidence the RTI² plan would meet the needs of all learners. Finally, the application did not sufficiently describe how the school would serve its special populations.

First, the academic plan failed to provide a clear and comprehensive explanation of the school's academic focus. In the application, IPA described its academic plan as "a three-tiered model, like the shape of the ivy, with rigorous instruction, personalized learning and social-emotional learning as the foundation."⁸ However, the application lacked evidence regarding how the personalized learning tier would be implemented. Additionally, the application states, "students will have the option to explore their passion based on their dreams, aspirations and interest in a career pathway class (majors) and a student-selected fine arts or applied art class (minors),"⁹ but IPA's instructional plan for their career prep and arts program relies entirely on part-time guest teachers. It is unclear how IPA would manage the quality and performance of these programs, which are central to its model, through entirely contracted instructors. During the capacity interview the applicant also cited two examples of organizations they have reached out to as possible contractors for the performance arts classes, but the applicant did not provide any examples of possible contractors for its applied arts or career prep classes. Since career prep and fine arts represent one-third of their academic model and accounts for two hours of instruction a day, the lack of evidence of a comprehensive plan to provide career prep or arts classes did not meet the standard required in the rubric.

Further, the intervention plan lacked a strong plan for RTI² that aligns with Tennessee guidelines. While the applicant stated their intent to collect data for RTI² classes on a weekly basis, the RTI² Data Team only plans to meet on a monthly basis. Given that the applicant did not provide details for when these meetings will occur nor the structure/length of these meetings, it is unclear whether one monthly meeting will be sufficient to assess each student's progress and plan new interventions for every student in the RTI²-A and RTI²-B programs. In addition, while the application provided examples of the academic services Tier II and Tier III students will receive during the intervention block, it did not specify what Tier I students would do at this time. During the capacity interview, the applicant explained that Tier I students would engage in project based learning; however, without a clear plan for how this will be executed, it is unclear when this will happen, who will staff it, and who will plan these activities.

Finally, the application lacked sufficient details to illustrate how the school would adequately serve its special populations, specifically students with disabilities and English learners (ELs). First, the plan includes conflicting information regarding the staffing model for special populations. For example, the application stated that "each grade-level will consist of one core content teacher per subject, one special

⁸ Ivy Prep Academy amended application, pg. 26.

⁹ Ibid.

education teacher, and one EL teacher, and one paraprofessional.”¹⁰ However, a few pages later, the application states that IPA plans to “search for and hire one certified special education teacher, one certified EL teacher, and one education assistant to serve 5th and 6th grade” in Year 1 and “at maximum capacity” intends to have “1 ELL teacher and 2 education assistants.”¹¹ When the review committee asked for clarity on their staffing model during the capacity interview, the applicant provided a third staffing option, stating that they are hoping to hire a dually licensed Special Education (SPED)/English as a Second Language teacher; however, dually licensed teachers are often difficult candidates to find. Another question raised by the review committee was the applicant’s plan to have one administrator manage recruitment, enrollment, and family/community engagement while simultaneously overseeing the SPED program. Given the time it takes to recruit and enroll students for a new school, the committee lacked the evidence to affirm that this administrator would also be able to provide the necessary oversight to adequately manage a new SPED program.

Given the number of questions that remained after the capacity interview, the committee determined IPA’s academic plan design and capacity only partially meets the standard established in the rubric.

Strengths Identified by the Committee:

While the Academic Plan Design and Capacity partially meets standard because of the weaknesses described above, the review committee did find evidence of strengths within this section. Specifically, the applicant is knowledgeable about its intended student population, provided a compelling mission and vision for the school, and provided a thorough and comprehensive plan for family and community engagement. The review committee cited the applicants’ palpable passion for their proposed plan and the community they intended to serve. The proposed founder and her founding team bring a great deal of experience and an undeniable desire to serve the students of Nashville.

¹⁰ Ibid. pg. 86.

¹¹ Ibid. pg. 88.

Analysis of the Operations Plan and Capacity

Rating: Partially Meets Standard

Weaknesses Identified by the Committee:

The applicant's Operations Plan and Capacity partially meets standard because the applicant did not provide a realistic start-up plan, including a feasible budget in Year 0. In addition, the applicant lacked a convincing plan to secure and prepare a facility for staff and students prior to the start of the school year. Lastly, the applicant failed to provide a comprehensive plan for staffing its career pathways and arts programs.

First, the application lacked a realistic start-up plan and feasible budget. While the start-up plan included many tasks leading up to approval, the plan post-approval lacked sufficient details necessary for launching a new school, such as curriculum purchasing and/or development, specific enrollment targets and deadlines, specific staff recruitment targets and timelines, purchasing of technology and furniture for students and staff, school renovations, and other tasks that are imperative to the school's ability to function, or successfully implement academic activities. In addition, the plan relies entirely on the volunteer labor of the proposed executive director and director of recruitment and family engagement, the latter of whom would work part-time in Year 0. Given that the schools operating in North Nashville are under-enrolled and challenges associated with the ongoing health crisis could potentially complicate school opening efforts, such as student recruitment, the committee found a lack of evidence the plan provided was sufficient. In addition, the start-up budget only included \$20,000 in revenue, which was entirely comprised of philanthropic donation from the board of directors. During the capacity interview, the applicant stated they had an anonymous donor who was willing to give them the \$20,000, but there was no evidence to support this claim. While it was clear the founding team has experience in education and is motivated, the start-up plan did not provide a clear pathway for success or evidence of funding to launch a new school in less than a year.

Next, the applicant's facilities plan did not provide sufficient evidence that the school had the resources or plan to secure and prepare a facility prior to the start of the 2021-22 school year. The amended application included only one potential school site and did not provide a reasonable contingency plan. During the capacity interview, the applicant shared three additional options they are considering for a school site. While the applicant was able to speak to the benefits of each option, there was no clear plan or timeline for when a school site would be selected or how they would prepare the space to host a school. When asked why the budget did not allocate any resources for building renovations or facility start-up costs, the applicant indicated they were only considering spaces that are already prepared for students. However, one of the potential sites currently functions as a daycare and it is unlikely this site, along with the others, would be ready to house 5th and 6th grade students without some renovations or purchasing age-appropriate furniture.

Finally, the applicant's staffing plan for its career pathways and arts program, which are central to the school's academic model, was insufficient. The application identified staffing as a challenge stating, "Our design requires two classes of the day to be taught by community leaders or guest educators"¹² and

¹² Ibid. pg. 144.

explains that it will rely on local community organizations and churches to recruit these teachers as well as using undergraduate interns. During the capacity interview, the applicant clarified that they are aware that the use of undergraduate interns and unlicensed teachers is not allowable and cited two examples of community organizations who may be able to provide art teachers. However, it is still unclear how the applicant plans to hire enough licensed career prep teachers to support their academic model. In addition, at full capacity, the logistics of recruiting, hiring, and onboarding enough contractors to teach one-third of the instructional day for 400 students is unrealistic without a clearly defined plan of action.

Together, each of these concerns illustrated an operations plan that only partially meets the requirements of the rubric.

Strengths Identified by the Committee:

While the Operations Plan and Capacity partially meets standard because of the weaknesses described above, the review committee did find evidence of strengths within this section. Specifically, IPA has a strong understanding of the responsibilities of its governing board and has identified seven (7) individuals with a variety of experiences and skills to support in the development of their proposed school. The applicant has also identified a proposed executive director with experience serving as a school principal and delivering results in a turnaround environment. The applicant has thoughtfully crafted a vision for how it will offer professional development to its teachers beginning in the summer before Year 1 and throughout the academic year in the form of weekly coaching sessions and 2-hour professional development afternoons on Wednesdays, thus allowing its school leaders to tailor coaching to the individual and varied needs of teachers and students.

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 standard because it lacked a complete, realistic, and viable start-up and five year operating budget. The Year 0 budget provided by the applicant is insufficient to support the work outlined in the start-up plan. Additionally, the applicant plans on starting Year 1 with only \$300 cash on hand. Furthermore, the financial plan lacks developed contingency plans should any setbacks occur with its proposed facilities plan, meeting its enrollment targets, or fully hiring its staff. Each of these concerns amounted to a lack of compelling evidence of a sound financial plan for the school.

To start, the applicant's Year 0 operating budget is insufficient to support a realistic start-up plan. The applicant anticipates only spending \$20,000 in Year 0 and intends to allocate those dollars to student and staff recruitment and marketing materials. This fails to account for the start-up costs associated with procuring and furnishing a building, purchasing and preparing technology, and making necessary instructional purchases including curriculum and teacher/student supplies. Rather, the applicant intends to take out a loan of \$230,000 on July 1 of Year 1 to cover these additional costs, leaving IPA with a very small window of time to purchase items and accomplish many critical tasks prior to the start of the school year. It is also unclear if this size loan will be sufficient, as the school intends to have expenditures of more than \$300,000 during July and August of Year 1.

Additionally, the applicant intends on starting Year 1 with only \$300 cash on hand and finishing the year with \$57,000 in reserves. This provides little room for error on its revenue and expenditure projections, which is further complicated by the applicant's assumption that they will receive \$300,000 in CSP grants in both Years 1 and 2, which is not a guarantee and would lead to significant budget shortfall both years. The applicant's contingency plan, should they not receive the CSP grants, is to take out additional loans to cover the gap in costs, but no evidence was provided to illustrate that they have an initial approval for these loans from their proposed loan provider or a plan to repay these loans in addition to the Year 1 loan the school already intends to open.

Finally, given the projected budget's lack of available reserves in Year 0 and Year 1, contingency planning is of utmost importance. However, the application does not provide a detailed plan to cut spending if the school cannot meet its projected enrollment level or if it fails to receive expected grants, beyond the reduction of a grade level which would have a cascading effect on several other areas of the application. In totality, the plan provided in the financial section of the application does not meet the standard explicitly stated in the rubric.



Evaluation Team

Sam Brobeck is an Associate Consultant at Education Resource Strategies in Watertown, MA. He previously served as the 8th Grade Math and Algebra 1 teacher at Grizzlies Prep, a public charter middle school in Memphis, Tennessee. Additionally, Sam served as the Chair of the Math Department at Grizzlies Prep. He has also served as a 2020 Rappaport Institute Public Finance Fellow, a 2018-2019 SCORE Tennessee Educator Fellow, a mentor teacher through Memphis Teacher Residency, a Policy Fellow with Stand For Children, and an Aspiring School Leader Fellow with Teach For America—Memphis. Sam holds a Master of Education degree in Education Policy and Management from Harvard University, a certificate in Education Finance from Georgetown University, and a Bachelor of Arts degree in Political Economy and Urban Studies from Rhodes College.

Binh Doan is the Director of Operations at Aurora Collegiate Academy, a K-5 charter elementary school in Memphis, Tennessee. Binh has experience teaching at both the elementary and middle school level. Additionally, she has served on the board of The Collective Memphis, Teach For America's association for alumni of color, and the regional strategy team for 90-ONE, a Memphis-based organizing network for educational equity. Binh is an alum of Teach For America - Memphis, New Memphis' Embark program, and the Breakthrough Collaborative's teaching fellowship. Binh holds a Bachelor of Arts degree in Archaeological Studies from Yale University and a Master of Education degree from Christian Brothers University.

Chad J. Fletcher is the Federal Programs Supervisor and District Testing Coordinator for Bedford County Schools. Chad began his career as a high school History and Geography teacher in Metro-Nashville/Davidson County Schools. After gaining valuable classroom teaching experience, Chad served as a school and district administrator for 18 years in Murfreesboro City, Knox County, and Manchester City Schools before joining Bedford County in July 2019. Chad earned his Bachelor, Master of Education, and Education Specialist degrees from Middle Tennessee State University and previously served on the Tennessee Department of Education's Personalized Learning Taskforce.

Nate Parker serves as the Coordinator of Policy and Federal Programs for the Tennessee State Board of Education. In this role, he manages LEA compliance and federal programs for State Board authorized charter schools. He is also currently enrolled in Vanderbilt University's Doctor of Education program in K-12 Education Leadership and Policy. Nate is a former Teach For America alum with a decade of experience as a secondary teacher, assistant principal, and principal, working in traditional public schools and charter schools in Arizona, Connecticut, Ohio, and Tennessee. He is twice a graduate of the Ohio State University, earning a Bachelor of Arts degree in Integrated Social Studies and Master of Public Administration degree, and a graduate of Arizona State University earning Master of Education degree in Secondary Education.

Hillary P. Sims has been a founding member of several Tennessee charter schools beginning shortly after the passing of Chapter 13. She holds a Bachelor of Science in Psychology & Sociology degree from East Tennessee State University, a Master of Science in Holistic Teaching and Learning degree 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. Having taught in traditional public and private schools as well as serving as a School Administrator for more than 15 years, Hillary brings a broad scope of school academics, culture, start-up, operations, and governance experience. Hillary has contributed to charter school improvement across the United States while working for a global charter management organization. Hillary has served on the Governor’s Advisory Council for Students with Disabilities and as a charter review team member for the State Board of Education for the last six years. Her areas of expertise include students with disabilities, mental health, compliance, holistic learning strategies, special populations, and culture. Hillary currently serves as an Exceptional Education Coach for Metropolitan Nashville Public Schools.

Robert Wallace serves as the Director of Operations at KIPP Antioch College Prep Elementary. Robert was first introduced to education through Teach For America. After completing Teach For America’s two-year teaching requirement, Robert continued to serve students in the Nashville community as an educator. Robert taught middle school Reading, Math, Science and Social Studies in Metro Nashville Public Schools for four years. Robert is a cum laude graduate of Belmont University with a Bachelor of Business Administration degree in Business Management. Robert earned his Master of Education degree in Instructional Practice at Lipscomb University. Robert is continuing his education at Vanderbilt’s Peabody College as a candidate for a Doctorate of Education degree in Leadership and Learning in Organizations. Robert is committed to ensuring that all students receive an excellent education, so that they are able to increase their college access and live choice-filled lives.

EXHIBIT B



Charter School Application Review Report

Submitted By: Ivy Prep Academy

Evaluation Team

Office of Charter Schools

Dennis Queen, Executive Office of Charter Schools, MNPS

Dr. John Thomas, Director, Office of Charter Schools, MNPS

Denise Brown, Coordinator, MNPS

Review Team

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Daniel Killian, Director Exceptional Education of Fiscal State Reporting and Monitoring, MNPS

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Dr. Matthew Nelson, Director Advanced Academics Talent Development, MNPS

Alyssa Udovitsch, English Learner Coach, MNPS

Todd Wigginton, Director of Instruction Elementary, MNPS

Dr. Jennifer Berry, Director STEAM Science, MNPS

Ashley Montgomery, Consultant

Charter School Amended Application Review Report

Submitted By: Ivy Prep Academy

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Dr. Jennifer Berry, Director STEAM Science, MNPS

Ashley Montgomery, Consultant

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 the information that was presented in the application and the capacity interview. The review team will present their findings to the MNPS Board of Education for them to approve or deny the application.

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 and capacity interviews
- **Report findings** – an overall review of application and capacity interviews, 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 review findings for each
 - › **Academic Plan** – Describes the applicant’s model in regard 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, it is best practice to only approve a charter that receives a rating of **meet or exceed the standard in all three major areas** during the application and capacity interview.

Proposal Overview

Operator/Applicant – Ivy Prep Academy

School Name – Ivy Prep Academy

Mission and Vision:

Mission: Our mission is to prepare 100% of our students with the foundational skills they need for acceptance into one of the top colleges or universities in the country and provide them with the knowledge they need to pursue a pathway to a career, entrepreneurship or the workforce immediately following high school. We believe that personalized learning paired with traditional education can close the achievement gap for all students no matter their race, class, background and/ or academic history.

Vision: Our vision is to provide Nashville children with a college and career readiness educational opportunity through a rigorous, comprehensive 5-8 program that cultivates the intellectual, creative, and social emotional development of every child. Our goal is to close the achievement gap by educating middle school students from low – income areas and teaching them to become independent learners, critical thinkers, and career-minded individuals while they acquire the academic skills they need to succeed in high school and throughout life. We envision a school where individual student interest are not only valued but celebrated as a part of the overall academic program.

Proposed Location – N/A

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

Grade Level	Number of Students					
	Year 1 2021- 22	Year 2	Year 3	Year 4	Year 5	At Capacity 2025- 26
5	75	85	90	95	100	100
6	75	85	90	95	100	100
7	0	85	90	95	100	100
8	0	0	90	95	100	100
Total	150	255	360	380	400	400

Original Summary Analysis – The Metropolitan Nashville Public Schools Office of Charter Schools has established itself over the past several years as an authorizer of national prominence, with an application process that is fair, transparent, and aligned with national standards. As a result, our charter sector is one of the strongest in the nation, and we always welcome new and innovative applications that serve our students and families well.

The lens through which our review team evaluates an application is one that looks for innovative instruction that produces high quality academic outcomes for all students, school operations that support those academic outcomes and sustainable fiscal practices that ensure strong financial stability.

A summary of the qualities we have identified as present in a high-quality application is as follows:

- Academic Program Design and Capacity
 - Detailed, curriculum and instructional strategies that align with the mission, target population, and state standards
 - Thorough, current research that supports the curriculum and instructional strategies
 - Articulation of a sound rationale for the application
 - Detailed plans for meeting all student needs, including accelerated learners, remediation, special education, and English Language Learners
 - Demonstrated internal alignment including scheduling and calendar
 - Includes sound plans for family and community engagement
 - Describes a school culture that reflects alignment to the school’s mission and goals.
- Operational Plan and Capacity
 - Includes a sound and reasonable plan for staffing that is likely to attract and retain top talent
 - Presents a thorough and reasonable plan for start-up operations
 - Provides compelling detail on the school’s plan for performance management
 - Presents an organizational chart aligned with the leadership and staffing structure
 - Has viable employment practices
 - Articulates clear roles and appropriate responsibilities for governance and management
 - Identifies founding Board members with diverse skills needed to govern effectively
 - Identifies potential facilities and outlines the costs within the financial document
 - Outlines a solid transportation plan that is reasonable and equitable to attract a diverse group of students
 - Presents a plan for compliance with all federal and state requirements
- Financial Plan and Capacity
 - Realistic projections with clear assumptions from start-up through full enrollment
 - Spending priorities that align with the school’s mission, support the academic program, support the management structure, professional development needs and growth plan

- Cash flow projections that align to the MNPS Performance Frameworks and align with the overall budget
- Sound financial controls to ensure appropriate use of public funds and long-term viability
- Demonstrated financial planning and management capacity
- Reasonable and transparent fundraising goals with disclosure of funders.
- Disclosure of all anticipated loans, gifts, and grants, including letters from funders confirming their investment should the school become approved.

After a thorough review of the Ivy Prep Academy's written application and capacity interview the review team and the MNPS Office of Charter Schools came to a consensus on the three major components of the application. This report has the ratings and explanation of the ratings for each section.

Section Summaries

Academic Plan: Partially Meets Standard
Operations Plan: Partially Meets Standard
Financial Plan: Does Not Meet Standard

Amended Section Summaries

Academic Plan: Partially Meets Standard
Operations Plan: Partially Meets Standard
Financial Plan: Does Not Meet Standard

Academic Plan Detail

Rating: Partially Meet Standard

Summary as Presented in Proposal: Ivy Prep Academy submitted an application for Ivy Prep Middle School to be located in North Nashville. They propose to create a middle school that has an emphasis on career, arts and technology. At full capacity, the school would have 400 students. Ivy Prep Academy’s vision is to provide Nashville children with a college and career readiness educational opportunity through a rigorous, comprehensive 5-8 program that cultivates the intellectual, creative, and social emotional development of every child. Their goal is to close the achievement gap by educating middle school students from low – income areas and teaching them to become independent learners, critical thinkers, and career-minded individuals while they acquire the academic skills they need to succeed in high school and throughout life.

Review Team Analysis: The application was given a rating of partially meets standard for the academic plan section. After a through review process the review team along with the MNPS Office of Charter schools found the applicant lacked a concrete academic plan. The team agrees that the Ivy Prep Academy team has the passion and a “can do/ will do” attitude that is necessary for student success. A positive outlook is important but having the logistics of the academic plan in place is a cornerstone that cannot be ignored.

The mission and vision for Ivy Prep Academy is embedded in the idea that career, art and technology are needed in North Nashville. In the North Nashville area, there are several middle schools with themes that include a Museum magnet, a medical focus and a STEAM middle school. An additional area of concern with the Ivy Prep Academy application was the lack of staffing for the career and art academic areas.

The enrollment projection was another cause for concern to the review team. The applicant stated that there was a decline in middle school enrollment in the area that they intend to serve. At this time, we are unsure how they will meet their enrollment projections with middle schools in the area that offer both career and arts options. Also, there are very few middle schools in that area that have a waiting list.

When reviewing the Academic focus and plan there were several concerns. Arts and Career engagement are a significant part of the mission statement, but the curricular choices are not yet available, and there is no plan on how to grade arts and career education. The applicant expects arts experts to support the program but has only connected with one community organization that might be able to appropriately support the mission. This is also true for the career exploration piece of the design, which is integral to mission and model. Business Partners are not yet determined and have not committed to the school. The applicant suggests that the staffing for several of these courses will be filled from an undetermined pool of community volunteers. Additionally, the program depends on one administrator who has multiple other responsibilities managing volunteers.

The applicant indicated that they would use various curricula one being EngageNY. EngageNY is very complex and requires significant training and support. A support plan for EngageNY has

not been detailed. More detail is also needed around the TN RTI2 implementation guide for differentiated instruction. Clarity is needed around what students will experience during intervention time. Read Naturally and iXL are to be leveraged, but more detail is needed around the methods for providing differentiated instruction to meet the needs of all students, as well as a strong plan for RTI2, especially in math.

When considering the special population and at-risk students there is not a clear plan. They touch the surface of how they will approach special populations and at-risk students, but there is not a clear sense of what their actual plan is and what it will look like at the school. It's not enough to say they will follow RTI2. It's unclear who will support EE teachers and monitor IEPs for compliance or how low incidence students will be served. This deficiency is just not important for SWD but also for EL students who are dually certified as EL and SWD. When asked to address disproportionality - It was apparent that the applicants had not considered the need of having a documented plan to address this important area which the TDOE had recently cited school districts for violating just this past school year.

However, most importantly is the fact that the application never addressed the IEP component of high-quality transition planning starting at the age (13.5) - 14 years old in accordance with the TDOE Special Education Framework. In Tennessee, this is very important for career-ready students specifically consisting of EE students and students who are dually certified to receive both EL and EE services.

The review team had concerns around the specific strategies and resources for English learners. The applicant indicates that in previous training that she noted that instruction for ELs was mostly the same as training for other students who struggle, but that the biggest part was the language piece. Also, a clear explanation of the blended learning model the school will use and the role of teachers within the blended learning environment is not provided. The team was left with unclear plans on how the school will monitor progress in terms of proficiency in WIDA or how progress for ELs will be measured specifically in English language development. Plans to support English Learners are significantly incomplete, demonstrate a lack of preparation, are unsuited to the mission and vision of the district, and raise significant concerns about the viability of the plan or the applicant's ability to carry it out.

More detail and clarity are needed in the area of EL instruction. There is a plan to hire at least two teachers who are both certified in general education or specific content area and ELL or special ed-endorsed – they will provide pull-out and push-in supports. Will the two educators have also have other responsibilities? These are concerns that must be addressed to have a successful charter.

Regardless of what curriculum is used it is important that there is a plan in place to utilize and evaluate data. Questions remain around how students who score below 70% will be supported in mastering their grade level content. There is a lack of a clear description on how the applicant will help re-mediate students' who academically underperform and evidence that the re-mediation will result in improved academic achievement. Clarity is needed to explain how the school and its governing board will revise academic achievement goals based on student performance.

The geographic area for the proposed school has a student population performs in bottom percentages of state assessments. The long-term goal of 90% On Track or Mastered seems unrealistic considering performance across the state. There is no curriculum or strategies in place that will produce these overly ambitious results. The applicant indicates using NWEA MAP and practice TNReady assessments but does not articulate how these will provide strong data to evaluate the academic program and school performance.

In order to run a successful charter, it is important to have a clear plan on how multiple data points will be collected to provide analysis for student performance. With weekly, monthly, quarterly, yearly, academic and culture data being gathered, it is unclear what tool will be used to aggregate these data so that they can be analyzed for individual students, student cohorts, and at the school level throughout the school year, at the end of the year, and for the charter term. The application lacks detail around how teachers will be trained/supported in using and analyzing data other than the weekly meeting taking place. More detail is needed around the plan for utilizing and evaluating data.

Overall there is a lack of detail in each academic section and a lack of a cohesive model. The applicant team listed several strategies, methods, and curriculum, but it is unclear how they all work together and why they were chosen for the targeted student population. Additionally, there is not confidence that they will be able to meet their enrollment target given their current recruitment plan, and it is unclear why they have chosen this area. More information about addressing and serving the unique needs of student populations is needed. Detailed information around specific strategies for the populations the school will actively recruit is needed (ELs and SWDs).

During interview, more questions were raised, and concerns were not adequately addressed. This led to the ranking of partially meets standard for the academic plan.

Academic Plan Detail

Rating: Partially Meet Standard

Summary as Presented in Proposal: Ivy Prep Academy submitted an application for Ivy Prep Middle School to be located in North Nashville. They propose to create a middle school that has an emphasis on career, arts and technology. At full capacity, the school would have 400 students. Ivy Prep Academy’s vision is to provide Nashville children with a college and career readiness educational opportunity through a rigorous, comprehensive 5-8 program that cultivates the intellectual, creative, and social emotional development of every child. Their goal is to close the achievement gap by educating middle school students from low – income areas and teaching them to become independent learners, critical thinkers, and career-minded individuals while they acquire the academic skills they need to succeed in high school and throughout life.

Review Team Analysis: The application was given a rating of partially meets standard for the academic plan section. After a thorough review the review team along with the MNPS Office of Charter schools found the applicant lacked a concrete academic plan. The team agrees that the Ivy Prep Academy team has the passion and a “can do/ will do” attitude that is necessary for student success. A positive outlook is important but having the logistics of the academic plan in place is a cornerstone that cannot be ignored.

The amended application gave additional rationale for the need for an additional school in the area as low performance on the APF and the need for a high-quality school in this area.

The applicant has failed to show why or how the proposed academic plan will serve this population better than other areas schools. Although the applicant shared additional curricular options and mentioned some research, the research lacked citations. Also, the rationale around choices was driven by executive director experience and not driven by independent research. The applicant provides a list of requirements and best practices for response to intervention, but there is not a clear plan for how this will manifest in a school or what it would look like in practice.

The applicant discusses strategies for delivering instruction (TLAC), but it isn’t a clear philosophy around how students learn. The applicant lists common characteristics of high performing, high poverty schools, but it is unclear how the school will embody these practices. Implementation is not clearly described.

There are was no clear plans for how the school will monitor progress in terms of proficiency in WIDA or how progress for ELs will be measured specifically in English language development.

The board will review student performance in quarterly and annual reviews, but the applicant didn’t articulate a process. Concerns related to missing details remain although the applicant included samples of data protocol questions.

The amended application has outlined a plan for “Low Incidence Student Supports” and includes 3 areas of focus. There are few specifics around how/when students with disabilities will receive instruction. The applicant discusses topics like how general education and special education

teachers will receive training in co-teaching, and how the applicant will use “high incidence needs programs”, but the amended application is lacking specifics.

The academic plan is particularly weak and lacks detail around all of the criteria above. There is not a definite plan – instead, they touch the surface of how they will approach special populations and at-risk students, but there is not a concrete sense of what their actual plan is and what it will look like at the school. It’s not enough to say they will follow RTI2.

EE Coordinator role will support students. The coordinator will start as part time. A part time coordinator is a concern because there are multiple responsibilities for a part-time employee.

The amended application indicates understanding of requirements for serving English Learners but does not share a plan for success in supporting at risk students.

Also, the applicant does not share what appropriate assessments will be used to monitor language proficiency, although they indicate that they will use Elevation to track the data. They mention using iXL and NWEA data to drive language instruction, but it is unclear how speaking and listening progress will be monitored.

Overall, we find that the amended application lacks detail and lacks comprehensive plan.

Operational Plan Detail

Rating: Partially Meets Standard

Summary as Presented in Proposal: The application has board comprised of six members who have experience in education, law, grant writing, fundraising, community engagement, and finance. The applicant has an executive director who has extensive experience in both charter and traditional schools. The school will use TEAM as the evaluation tool for educators. There is no location that has been secured for the proposed school.

Review Team Analysis: The Operations Plan partially meets standard because each section in the operations sections lacked details that would provide a clear picture of the daily and long-term operation of the school. There was not a definite location for the proposed school. Transportation and nutrition plans have not been thoroughly flushed out which causes major concerns for the review team.

The governing board currently consist of six board members. The board is very knowledgeable in a variety of fields but there isn't a concrete plan around the board members responsibilities. The applicant indicates that there will be subcommittees for operational, academic, and financial needs. It is not clear how these subcommittees will be formed. It was also stated in the interview that the board may increase up to as many as fifteen members.

The governing board is currently looking at ways to address unsatisfactory leadership performance. The board is also brainstorming ideas to make sure that parents, students and staff are providing input in school decisions that include data analysis. They indicate that there will be a system of checks and balances to monitor the performance of the school leaders, but there is no current evidence of this plan. A clear process and clear expectations are not detailed in a way where board members can execute on responsibilities at this time. They indicate that they will adopt bylaws, COI policy, and establish a committee structure after they are authorized. These are all things that need to be established with their 1023 application for 501c3 status.

The applicant indicates that a loan will be used to cover start-up cost, but they did not share how the startup loan will be paid off over the course of the charter. There is concern around over all financing for the facility as the goal is for little fundraising and other sources that are not available at start up.

Staffing for the proposed school also caused major concerns. There is not much confidence that the applicant can secure teachers who are highly effective that will be required to work more at a lower salary than other area teachers. The recruiting plan for educator needs more details. The applicant also indicates that the teachers will volunteer to work as after school tutors. A concrete plan to support, develop and evaluate both teachers and leaders has not been developed.

The review team had additional questions around the staffing projections. In Y1 they will have an executive director, assistant principal of instruction, assistant principal of students, director of operations, and director of recruitment and family engagement. This staffing plan is top heavy

and excessive for Y1, given that they will have 150 students in two grades. No clear rationale provided.

The applicant indicates possibly using college juniors and seniors to serve in year-long internships to teach classes (2 classes/day). It is unclear how students will be vetted, how they will be supported and trained to conduct classes, who oversees creating lesson plans, how they will be monitored and evaluated, and what college partnerships they have already developed. These are questions that needed to be answered in the application or the capacity interview. The applicant indicates having a monthly SWD/EL PD that includes IEP/ILP compliance updates and progress toward goals but does not articulate a clear plan for professional development around SWD and EL beyond that (e.g., how to support them). It appears that they will provide a fair amount of PD throughout the year, but more detail is needed around how the time will be spent, how topics will be chosen, etc. PD aligned with and focused on evaluation results would allow for individualized offerings specific to strengths and opportunities for growth, but it is unclear how this would be accomplished in a weekly, all team meeting. The applicant also indicates the behavior interventionist will also present culture PD and conduct and provide feedback from weekly culture walkthroughs. The review team is unclear on how this position is appropriately compensated for these additional responsibilities. There is also a lack of clarity around how this person will be trained and who will train them. Additional questions remain about how educators will be trained in data analysis and action planning around data.

The review team was pleased with the transportation budget. Currently the applicant is unable to share detail around daily transportation routes. The applicant indicates that Greyline did not express strong interest in working with the school. They are unsure who they would contract with to provide transportation if Greyline was unable to take on more clients. Applicant did not articulate alternative plan, nor take steps to find alternative. The applicant indicates buses seating 70-90 passengers which seems like more than typical. There is currently no plan to transport youth in foster care if a BID meeting results in extra costs for transportation for students.

Amended Operational Plan Detail

Rating: Partially Meets Standard

Summary as Presented in Proposal: The application has board comprised of six members who have experience in education, law, grant writing, fundraising, community engagement, and finance. The applicant has an executive director who has extensive experience in both charter and traditional schools. The school will use TEAM as the evaluation tool for educators. There is no location that has been secured for the proposed school.

Review Team Analysis: The Operations Plan partially meets standard because each section in the operations sections lacked details that would provide a clear picture of the daily and long-term operation of the school. There was not a definite location for the proposed school. Transportation and nutrition plans have not been thoroughly flushed out which causes major concerns for the review team.

The amended applicant is not able to share the board members responsibilities with concrete plans. There are many board responsibilities that have not yet been articulated and assigned. The overview around board responsibilities needs far more details.

The governing board is currently looking at ways to address unsatisfactory leadership performance. The board is also brainstorming ideas to make sure that parents, students and staff are providing input in school decisions that include data analysis. They indicate that there will be a system of checks and balances to monitor the performance of the school leaders, but there is no current evidence of this plan. A clear process and clear expectations are not detailed in a way where board members can execute on responsibilities at this time. They indicate that they will adopt bylaws, COI policy, and establish a committee structure after they are authorized. These are all things that need to be established with their 1023 application for 501c3 status.

The applicant indicates that a loan will be used to cover start-up cost, but they did not share how the startup loan will be paid off over the course of the charter. There is concern around over all financing for the facility as the goal is for little fundraising and other sources that are not available at start up.

Staffing for the proposed school also caused major concerns. There is not much confidence that the applicant can secure teachers who are highly effective that will be required to work more at a lower salary than other area teachers. The recruiting plan for educator needs more details. The applicant also indicates that the teachers will volunteer to work as after school tutors. A concrete plan to support, develop and evaluate both teachers and leaders has not been developed.

The review team had additional questions around the staffing projections. In Y1 they will have an executive director, assistant principal of instruction, assistant principal of students, director of operations, and director of recruitment and family engagement. This staffing plan is top heavy and excessive for Y1, given that they will have 150 students in two grades. No clear rationale provided.

The applicant indicates possibly using college juniors and seniors to serve in year-long internships to teach classes (2 classes/day). It is unclear how students will be vetted, how they will be supported and trained to conduct classes, who oversees creating lesson plans, how they will be monitored and evaluated, and what college partnerships they have already developed. These are questions that needed to be answered in the application or the capacity interview. The applicant indicates having a monthly SWD/EL PD that includes IEP/ILP compliance updates and progress toward goals but does not articulate a clear plan for professional development around SWD and EL beyond that (e.g., how to support them). It appears that they will provide a fair amount of PD throughout the year, but more detail is needed around how the time will be spent, how topics will be chosen, etc. PD aligned with and focused on evaluation results would allow for individualized offerings specific to strengths and opportunities for growth, but it is unclear how this would be accomplished in a weekly, all team meeting. The applicant also indicates the behavior interventionist will also present culture PD and conduct and provide feedback from weekly culture walkthroughs. The review team is unclear on how this position is appropriately compensated for these additional responsibilities. There is also a lack of clarity around how this person will be trained and who will train them. Additional questions remain about how educators will be trained in data analysis and action planning around data.

The initial concerns remained around the acquisition of a facility.

The applicant is still committed to top heavy leadership structure that isn't supported by strong rationale. The applicant provides a three-stage hiring strategy and discusses partnerships with EPPs that they want to pursue. There is more work to be done around expanding that network.

It appears they will provide a fair amount of PD throughout the year, but more detail is needed around how the time will be spent, on these topics: Curriculum, Teaching Framework, Grading Support, Mentorship, EE and EL Coordinator support (163).

The applicant shares resources for teacher learning – Teach Like A Champion and Driven by Data, but it is unclear how they will engage educators in the learning over time. Data protocol sample questions were provided.

Applicant provided stages of transportation plan and ideas for moving forward, but it was unclear what contractual agreements might exist.

The review team did not find that there were enough changes to the application to improve the overall ranking in this section.

Financial/ Business Plan Detail

Rating: Does Not Meet Standard

Summary as Presented in Proposal: The application indicates \$410k in fundraising and or philanthropy in Y0 (\$285k from NSVF and \$125k from Charter School Facilities Funding) – if awarded this funding, applicant won't receive it until after start-up. The contingency plan is a loan. There is no indication how to repay the loan over the course of the charter.

Original Review Team Analysis: This financial plan does not meet standard because the applicant doesn't have a concrete plan around the management or acquisition of funds. The review team did not have confidence that current financial plan can support and sustain the proposed school.

- The application mentions 20K in fundraising twice a year. Governing Board is expected to also fundraise.
- Salary estimates are in line with those in MNPS, but the responsibilities of the work seem more than that of many local schools. Rationale is that employees will be committed to the work.
- Important to the long-term success of charter schools is an employee on the ground who can manage day to day and long-term finances. No one has been identified to lead this work in a paid role in the organization.
- Mentions \$300k from CSP for Y1-2, indicating a limited understanding of these funds.
- Staffing plan in budget narrative doesn't align with staffing plan in narrative (budget narrative only has 1 assistant principal in Y1 and 2 SPED teachers in Y2 when narrative has 2 APs in Y1 and 3 SPED teachers in Y2); ALSO, budget only includes 1 AP in Y1, and 2 SPED teachers in Y2.
- In Y1-5 staff assumption tab, it lists the base assumption for dean/director as \$60.
- In Y1-5 staff assumption tab, it lists base assumption for teachers as \$48k, but in the narrative, they say salaries will start at \$46k
- In the Y1 budget tab, the assistant principal of instruction is not listed, but in the narrative, the applicant group indicates that this position will start in Y1
- Y1 cash flow indicates the first month at a \$393,307 deficit with no plans to address this.

Amended Financial/ Business Plan Detail

Rating: Does Not Meet Standard

Summary as Presented in Amended Proposal: The application indicates \$145k in fundraising and or philanthropy in Y0 (\$285k from NSVF and \$125k from Charter School Facilities Funding) – if awarded this funding, applicant won't receive it until after start-up. The contingency plan is a loan. There is no indication how to repay the loan over the course of the charter.

Original Review Team Analysis: This financial plan does not meet standard because the applicant doesn't have a concrete plan around the management or acquisition of funds. The review team did not have confidence that current financial plan can support and sustain the proposed school.

- The application mentions 20K in fundraising twice a year. Governing Board is expected to also fundraise.
- Salary estimates are in line with those in MNPS, but the responsibilities of the work seem more than that of many local schools. Rationale is that employees will be committed to the work.
- Important to the long-term success of charter schools is an employee on the ground who can manage day to day and long-term finances. No one has been identified to lead this work in a paid role in the organization.
- Mentions \$300k from CSP for Y1-2, indicating a limited understanding of these funds.
- Staffing plan in budget narrative doesn't align with staffing plan in narrative (budget narrative only has 1 assistant principal in Y1 and 2 SPED teachers in Y2 when narrative has 2 APs in Y1 and 3 SPED teachers in Y2); ALSO, budget only includes 1 AP in Y1, and 2 SPED teachers in Y2.
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- In Y1-5 staff assumption tab, it lists base assumption for teachers as \$48k, but in the narrative, they say salaries will start at \$46k
- In the Y1 budget tab, the assistant principal of instruction is not listed, but in the narrative, the applicant group indicates that this position will start in Y1
- Y1 cash flow indicates the first month at a \$393,307 deficit with no plans to address this.

The review team felt amended application did not have enough edits to change the original ranking.