

Renewal Application

Libertas School of Memphis

General Information

Name of Charter School	Libertas School of Memphis
Mailing Address	3777 Edenburg Drive, Memphis, TN 38127
School Phone	(901) 609-3611
School Website	www.libertasmemphis.org
Current School Leader	Bob Nardo

Primary School Contact

Name of Primary Contact	Bob Nardo
Title of Contact	Executive Director
Contact Telephone	(901) 609-3611
Contact E-mail Address	bob.nardo@libertasmemphis.org

Charter Agreement

Current Authorizer	Tennessee Public Charter School Commission
First Year of Operation	2015
Year Current Charter Awarded	2015
Year Current Charter Expires	2025

Student Demographics

Total Existing Enrollment	508
% of Economically Disadvantaged	50%
% of Students with Disabilities	17%
% of English Language Learners	0.19%

Proposed Grades/ Enrollment for New Charter Term

Libertas charter renewal enrollment plan										
	Renewal									
school year	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	33/34	34/35
charter year	11	12	13	14	15	16	17	18	19	20
grades	(P)K-7	(P)K-8								
total k-8	510	559	569	577	577	577	577	577	577	577
<i>total pk-8</i>	<i>608</i>	<i>657</i>	<i>667</i>	<i>675</i>	<i>675</i>	<i>675</i>	<i>675</i>	<i>675</i>	<i>675</i>	<i>675</i>

Assurances. As the authorized representative of the school, I hereby certify that the information submitted in this renewal application is true, to the best of my knowledge and belief, and if awarded a charter, the school will:

1. operate as a public, nonsectarian, non-religious public school, with control of instruction vested in the governing body of the school under the general supervision of its authorizer and in compliance with its charter agreement and the Tennessee Public Charter Schools Act of 20024;
2. follow all federal, state and local laws and regulations that pertain to the operation of a public school, unless waived according to T.C.A. § 49-13-111(p);
3. provide special education services for students as provided in Tennessee Code Annotated Title 49, Chapter 10, Part B of the Individuals with Disabilities Education Act; Title II of the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973;
4. adhere to all applicable provisions of federal law relating to students who are English learners, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974;
5. follow all federal and state laws and constitutional provisions prohibiting discrimination on the basis of disability, race, creed, color, national origin, religion, ancestry, or need for special education services;
6. comply with all provisions of the Tennessee Public Charter Schools Act of 2002, as amended;
7. employ individuals to teach who hold a license to teach in a public school in Tennessee;
8. comply with Open Meetings and Open Records laws (T.C.A. §§ 8-44-101 et seq.; 10-7-503, 504);
9. not charge tuition, except for students transferring from another district to the school pursuant to the local board's out-of-district enrollment policy and T.C.A. § 49-6-3003;
10. follow state financial (budgeting and audit) procedures and reporting requirements according to T.C.A. § 49-13-111, 120 and 127;
11. require any member of the governing body, employee, officer or other authorized person who receives funds, has access to funds, or has authority to make expenditures from funds, to give a surety bond in the form prescribed by T.C.A. § 8-19-101;
12. maintain all necessary and appropriate insurance coverage;
13. obtain all necessary permits, licenses, and certifications related to fire, health, and safety within the school building and on school property;
14. notify its authorizer immediately of any change in circumstances that may have a significant impact on the school's ability to fulfill its goals as stated in its charter agreement; and
15. submit a request to amend its charter agreement if the school plans to make a change to its operations.



Robert Nardo

3-27-24

Authorized Applicant Representative

Date

Application Narrative - Pursuant to TCA § 49-13-121, a public charter school renewal application shall contain a report of the school's operations, including students' standardized test scores, financial statements, and audits of the eight (8) years immediately preceding the date of the renewal application.

Section I - Academic Success

- A. Describe the school's academic achievement and growth results over the course of the current charter term. Include tables, charts, or graphs, as applicable, to illustrate cumulative and/or yearly assessment results.
- B. Address progress toward meeting the academic goals outlined in the current charter agreement. Were any amendments made to academic goals? If so, explain.
- C. Outline the school's assessment system and explain how assessments are used to inform instructional practice, evaluate teacher effectiveness, and implement professional development.
- D. Describe how the school uses other data (qualitative and quantitative) to evaluate the effectiveness of the academic program.
- E. Discuss progress made toward closing achievement gaps.
- F. Outline leader and teacher professional development and its impact on student achievement.
- G. Explain how the school supports diverse learners.
- H. Discuss areas of academic concern and changes made to address any deficiencies.
- I. Explain why the school's academic outcomes merit renewal of its charter agreement.

Section II – Operational Stability

- A. Address progress toward meeting the operational goals outlined in the charter agreement, if applicable.
- B. Discuss student enrollment over the course of the current charter term. Is the school operating at maximum capacity? How many students are currently on the waitlist?
- C. Describe trends in student attrition rates and how leaders have addressed any concerns in attrition.
- D. Explain how the school provides a safe environment and addresses the physical, social, emotional, and health needs of students.
- E. Explain how the school has made community connections and developed working relationships with parents and families.
- F. Explain how the school sustains a well-functioning organizational structure that provides for personnel stability and effective teacher retention.
- G. Describe the development of the board members and school leadership during the current charter term.
- H. Describe any facility changes/improvements and their impact on achieving school goals.
- I. Explain why the school's operational condition merits renewal of its charter agreement.

Section III - Financial Health

- A. Address progress toward meeting the financial goals outlined in the charter agreement, if applicable.

- B. Report on the fiscal management of the school during the current charter term based on previously submitted audits, including A-133 audits if applicable, and financial reports.
- C. Address the alignment between expenditures and the school's mission, plans for student academic growth, and staff professional development.
- D. Review how any significant fiscal challenges were addressed during the current charter term.
- E. Describe efforts to operate the school in a financially sound and transparent manner.
- F. Explain why the school's financial condition merits renewal of its charter agreement.

Section IV – Future Plans/Projections

Provide an overview of the charter school's future goals and plans for their achievement, including:

- A. Academics and updated academic benchmarks
- B. Organizational changes (if applicable)
- C. Expansion (if applicable)
- D. Facility improvements
- E. Projected financial security
- F. Operational management
- G. Addressing any past academic, organizational, or financial deficits

Appendices

Renewal applicants may append documents supporting the renewal application. Any appendices should be clearly labeled and referenced in the narrative of the application.

Section I - Academic Success

- A. Describe the school’s academic achievement and growth results over the course of the current charter term. Include tables, charts, or graphs, as applicable, to illustrate cumulative and/or yearly assessment results.

Mission and Vision

The mission of Libertas is to be a school for human flourishing: cultivating the minds, hands, and hearts of children in Memphis for lives of wonder, work, and love. We opened in 2015 to turn around the second-lowest achieving elementary school in the state as part of the ASD, offering the human-centered learning model of Dr. Montessori - normally only accessible in private schools - as a zoned enrollment school in a neighborhood with a 64% child poverty rate, and where almost every single public school was on the state’s “priority schools” list for bottom 5% achievement. Before our arrival, Brookmeade school had reading proficiency of 4%, suspensions at 24%, and at risk of closure with only 50% of its enrollment capacity. In the 9 years since, we have transformed this school into one of the fastest-improving and highest-achieving schools in the state for at-risk student subgroups, and a national exemplar of urban Montessori education.

Program features

As the first Montessori charter school in the state, we provide a research-based, rigorous, personalized learning model. Working particularly with marginalized student populations, Dr. Montessori developed her approach based on extensive empirical observation, through which she identified “sensitive periods” that characterize the planes of child development, and developed tactile manipulatives or “works” that engage children’s concentration on the work of their development. Montessori noted that young children are capable of intense concentration and repeated practice—what Montessori calls “normalization”—when their work is responsive to their planes of development.¹ We present engaging, carefully designed, multi-sensory materials that lead “from the hand to the mind,” which help children to concentrate, master fine and gross motor skills, refine the senses, develop robust oral language skills, strong mathematical concepts, artistic sense, and more.

Montessori teachers meticulously prepare an orderly and engaging environment, where students learn through individualized lessons and focused and repeated practice with concrete materials that are carefully designed to build explicit understandings, thematically integrated, increase in complexity, and scaffold children’s comprehension of abstractions. Teachers observe student work, make needed adjustments for each individual’s plan, but avoid interference in “the moment of self-development”: those times of concentration when

¹ Montessori’s observations of planes of development were contemporary with or antecedent to Vygotsky’s work on zones of proximal development. And her analysis of “normalization” prefigured the work of Csikszentmihlyi on ‘flow’ – a state of immersed concentration and focus in which learning is its own reward. Her method is explicitly designed to maximize students’ chances of entering a state of ‘flow.’

children are doing the mental work they must do to learn. It is also why Montessori designed self-correcting materials, which make mistakes self-evident. This allows the student to practice independently and struggle with problems while also getting immediate feedback to prevent habituation of error. Through freedom and structure—and a teacher who can make thoughtful judgments based on observation – Montessori environments increase the efficiency of student learning and cultivate the child’s innate curiosity to master his environment.

While Montessori’s scope and sequence in most ways meets or exceeds state standards, we have also built a careful “roadmap” of lesson extensions to ensure we cover certain standards or performance expectations.

Also crucial to our academic model is an emphasis on content-rich curriculum that opens student horizons and strengthens their background knowledge and vocabulary. This is important both for justice for marginalized students as well as the other essential foundation for reading comprehension (along with fluent, true phonics-based decoding), as documented in the extensive research of E.D. Hirsch and Daniel Willingham. In addition to Montessori cultural and cosmic curriculum, we implement daily interactive read aloud using Core Knowledge Language Arts “Listening and Learning” strand in K-3 and a hybrid of CKLA and school-developed curriculum in upper elementary (and forthcoming middle school) grades.

Along with rich and personalized Montessori and Core Knowledge, another pillar of Libertas’ model is a human-centered culture built on a commitment to being an “attachment village” and culminating in the formation of virtuous character. Children thrive when surrounded by adults who love and expect the best from them, and exemplars of human excellence. Since inception, we have been dedicated to building close relationships with families and our community. Though few Frayser residents knew Montessori by name, conversations with parents consistently revealed their desire for an individualized education that acknowledges children come to school with a variety of aspirations, talents, and needs. Families wanted a better relationship with the school that overcomes the experience of a generation of disinvestment, high rates of exclusionary discipline and low rates of engagement. Therefore, in building a school based on the philosophy and strategies of Dr. Maria Montessori, Libertas began with a focus on empowering our community to thrive, rather than foregrounding our curricular brand. We foster community through multi-year “looping” of students (and families) in multi-age classrooms with the same 2 adults (teacher and assistant teacher) for 2-3 years, and an intensive array of family involvement opportunities. We surround children with exemplars of excellent character from history and literature, emphasizing the African American heritage of our community. We have developed a literature-based character and social-emotional development curriculum that is the center of twice-weekly classroom circles.

Impact

TVAAS	2018-2019	2020-2021	2021-2022	2022-2023
School-Wide: Composite	5	5	5	4
School-Wide: Literacy	4	4	5	5
School-Wide: Numeracy	5	5	5	3
School-Wide: Literacy and Numeracy	5	5	5	4

Academic growth: From 2019-2022, we were the **only** K-8 school in Memphis to earn the academic growth rating - TVAAS Level 5 - for three consecutive years. And in 2023, for the **fourth straight** year, we exceeded expectations on TVAAS.

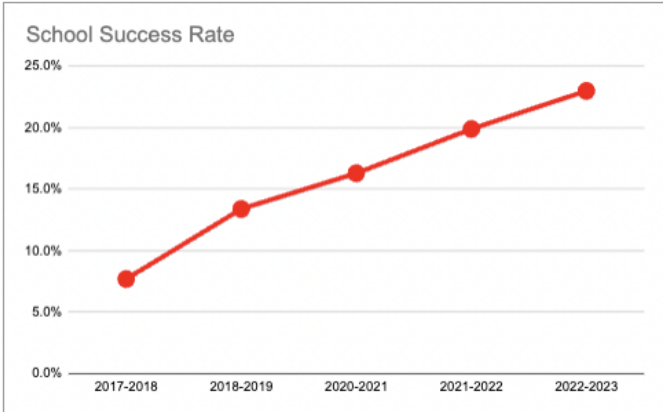
A similar story of strong growth is found on NWEA MAP, where we regularly exceed nationally normed growth goals as a school: 103% from fall to spring in 2023, and 133% from winter to spring, with at-risk subgroups growing equal to or faster than typical peers. Similarly, TVAAS reports show that our at-risk subgroups exceeded growth expectations almost every year.

TVAAS	2018-2019	2020-2021	2021-2022	2022-2023
SUBGROUPS				
All Students	5	5	5	4
Black or African American	5	4	5	4
Black/Hispanic/Native American	5	4	5	4
Economically Disadvantaged	4	4	5	3
White			3	4
Students with Disabilities	5	4	3	4
Super Subgroup	5	5	5	4

Furthermore, in 2023, we had among the highest growth percentiles in the state:

- 3rd grade math: 94th %ile
- 3rd grade ELA: 92nd %ile
- U4th-5th ELA: 62nd %ile
- 5th grade Science: 61st %ile

In terms of proficiency, we have **steadily improved achievement on TCAP.**



In 2021 we were the highest achieving zoned enrollment elementary school in Frayser:

<i>SCHOOL NAME</i>	<i>Student Success Rate</i>	<i>ELA</i>	<i>Math</i>	<i>Science</i>
LIBERTAS	16.3	20.1	12.7	18.7
Coming	<5	5.4	<5	<5
Frayser	<5	<5	<5	<5
Westside	<5	<5	<5	<5
Lucie E Campbell	8.5	10.2	6.9	15.1
Hawkins Mill	<5	5.6	<5	5.6
Georgian Hills	<5	<5	<5	<5
Whitney	<5	5.6	<5	7.1
Denver	7.3	9.2	5.4	13.2

We were also the highest achieving charter school in Memphis, and top 10% of charter schools statewide.

TCAP scores by subject area - all TN elementary charter schools

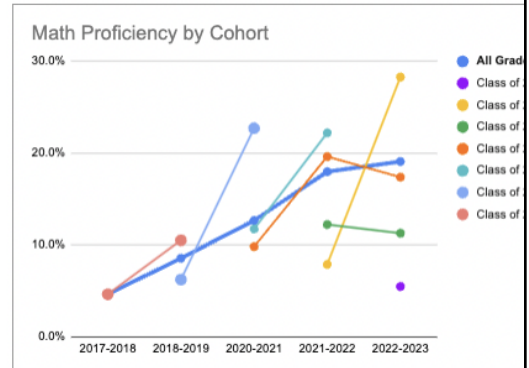
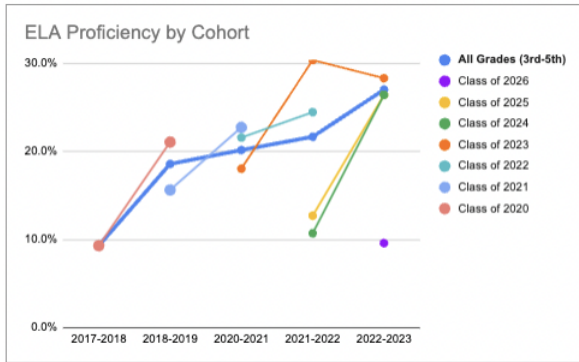
<i>School name</i>	<i>Success rate</i>	<i>ELA</i>	<i>Math</i>	<i>Science</i>
LIBERTAS	16.3	20.1	12.7	18.7
Arrow Academy of Excellence	6.7	9.5	<5	11.9
Aurora Collegiate	7.4	6.5	7.8	7.8
Believe Memphis	<5	<5	<5	<5
Chattanooga Charter School of Excellence	6.6	8.7	<5	6.7
Circles of Success	<5	<5	<5	<5
Compass Berclair	7.9	8.3	7.4	5.8
Compass Binghampton	8.9	12.8	5.3	8.2
Compass Frayser	6.5	6.8	7.7	12.1
Compass Hickory Hill	9.4	10.3	8.7	10.3
Compass Orange Mound	10.5	15.5	5.2	13.9
Cornerstone Lester	<5	<5	<5	9
Cornerstone Denver	7.3	9.2	5.4	13.2
East End Prep*	15.9	19	12.5	29
Emerald Academy*	19.7	19.1	20.4	26.2
Explore Community School	11.7	15.9	8.5	19.3
Freedom Prep Westwood	<5	<5	<5	<5
Freedom Prep Whitehaven	5.8	9.6	<5	6.9
Granville T Woods	5.1	8.6	<5	5
Journey Coleman	5.4	6.3	<5	<5
Journey East	8.9	11.6	6.1	8.6
Journey Hanley	<5	6.4	<5	6.2

KIPP Nashville	7.4	12.6
KIPP Memphis Collegiate	<5	<5
KIPP Memphis Academy	<5	5.6
KIPP Nashville College Prep	11	13.6
Leadership Prep*	6.6	10.1
Memphis Business Academy	8.3	11.7
Memphis College Prep	<5	5.8
Memphis Delta Prep	<5	<5
Memphis Scholars Caldwell Guthrie	<5	<5
Memphis Scholars Florida Kansas	<5	<5
Memphis School of Excellence Elementary	<5	<5
Memphis School of Excellence Cordova	13.7	18.9
Memphis STEM Academy	8.6	12.6
Nashville Classical*	27.4	34.4
Power Center Academy SE	14.1	16.9
Power Center Academy Elem	<5	7.4
Promise Academy	6.8	6.1
Promise Academy Spring Hill	7.3	8.4
Purpose Prep*	17.6	31.9
Rocketship Nashville NE	6.2	9.8
Rocketship United	14.6	16.7
Smithson Craighead Academy	17.2	23.5
Southern Ave Charter School	7.7	10.7
Star Academy	5.9	5.7
Vision Prep	5	7

We earned “priority exit” status from the Achievement School District and were approved to join the TN Public Charter School Commission.

By 2023, our overall performance levels were ELA 27%, Math 19.1%, Science 23.5%

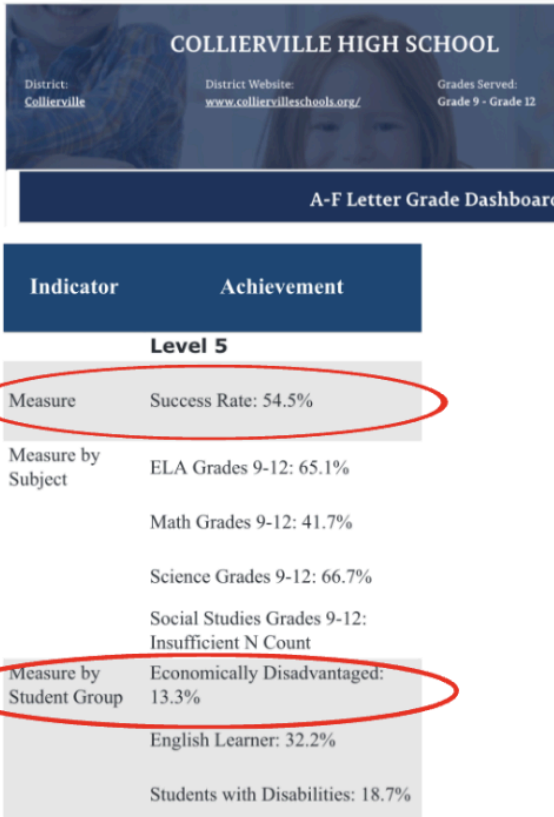
But beyond our overall success rate, which does not distinguish how students in our highly mobile neighborhood can change from year to year, we also showing consistent improvement in student cohorts - meaning that, even if a child isn’t here cumulatively (and thus doesn’t contribute to a continuous rise in school success rate), nevertheless they left better served than when they arrived.



Closing opportunity gaps for at-risk students: On 2023 state tests, our students not only exceeded reading proficiency as compared to MSCS, but drew within ~13 points of the statewide figure - despite having nearly *double* the rate of at-risk students as the state - and in fact exceeded state averages for reading among economically disadvantaged students.

Libertas achievement by subgroup compared to MSCS & TN			2023			
subject	grade	Group	% met/exceed			
Demographics				Libertas	MSCS	% +/-
		Black/Hispanic/Native American		84.5	92.0	36.0
		Economically Disadvantaged		49.2	56.0	31.0
		Free / reduced price lunch		85.0		47.0
		Students with Disabilities		21.5	11.0	13.5
				MSCS 2023 (3-5)		TN 2023 (3-5)
Achievement / Proficiency - TCAP (Includes MSAA)				%	+/-	% +/-
ELA	All	ELA Total	27.0	24.2	+2.8	40.3 -13.3
	All	ED	24.4	18.1	+6.3	23.3 +1.1

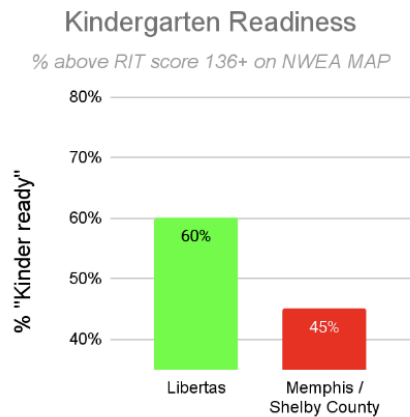
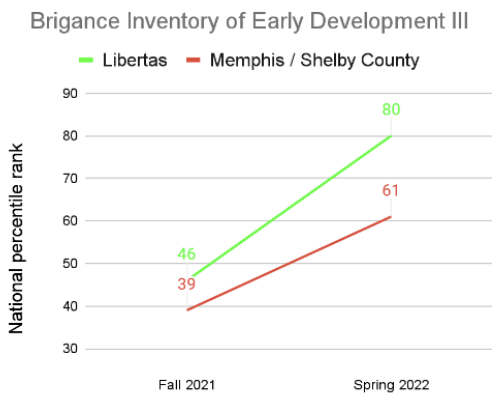
To put this into perspective, consider that reading proficiency for economically disadvantaged students is virtually **double** the proficiency for their peers in the wealthiest suburb of Memphis (which nevertheless received an “A” on the new school letter grades compared to our “C,” revealing how an emphasis on overall proficiency can mask the underlying realities for at-risk students).



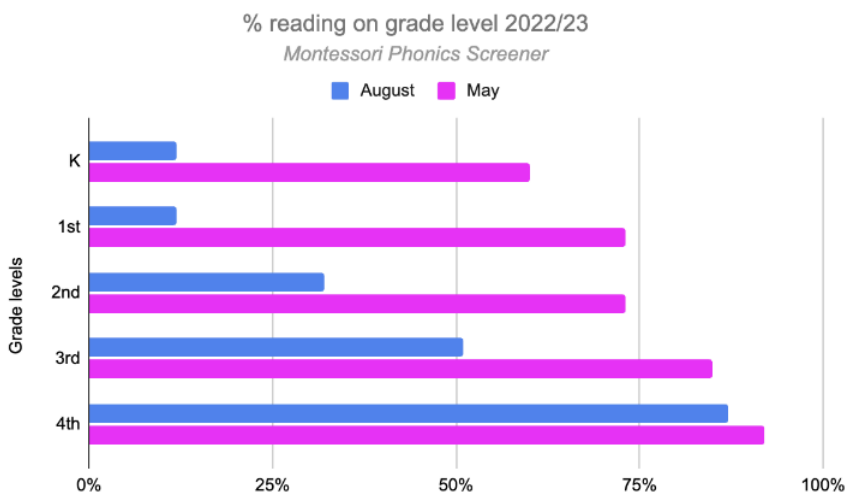
Two of our largest at-risk subgroups have performed in the top 15% of all TN schools across all accountability indicators in recent years:

- ★ Special education (2021)
- ★ Economically disadvantaged (2022)

Much of this trajectory of performance is due to our high quality early learning. With the largest PreK program of any school in Memphis, our early childhood students have grown 1.5 times faster than their peers across Memphis - reaching the 80th national percentile on the nationally-normed Brigance assessment of academics and child development (language, cognitive, adaptive, social-emotional). Similarly, every Libertas teacher earned the “highest level of effectiveness” on the TN PreK / Kindergarten Portfolio assessment for 2 straight years. And our PreK completers were about 30% more “Kindergarten ready” than their peers on the nationally-normed NWEA MAP test in the fall of their Kinder year (2022)



Another building block is our strong early reading strategy of phonics and background knowledge through Montessori and Core Knowledge. Using curriculum-based measures, we see substantial increases in grade-level decoding each year, such that by the time children are finishing 3rd grade they have nearly mastered basing decoding and are able to access content through reading.



Daily writing in response to reading in content, using exemplar writing and state rubrics, has helped to improve student writing substantially over time, as evidenced by these trends from last school year:

1st/2nd grow 1.3 (or 80% on level 4 or above)
 3rd-5th grow 1 (or 80% on level 3 or above)

Writing Prompts: By Grade Level								
Grade Level	-	Aug 19	Oct 7	Dec 9	Feb 10	Apr 6	May 19	
First Grade (avg out of 5 points)		1.3	2.1	2.3	2.9	3.3	3.6	+2.26
Second Grade (avg out of 5 points)		2.1	2.3	2.4	2.8	2.8	3.1	+0.97
Third Grade (avg out of 4 points)		1.4	1.9	1.9	2.1	2.1	2.3	+0.82
Fourth Grade (avg out of 4 points)		1.4	1.6	1.8	2.1	2.1	2.0	+0.58
Fifth Grade (avg out of 4 points)		1.6	2.5	2.6	2.2	2.7	2.5	+0.99

Another key input is our Arete Memphis Public Montessori Residency, the nation's first dual certification (state license plus nationally accredited diploma) urban Montessori teacher residency. We are training 100 new teachers and 100 support staff over 5 years while doubling the diversity of the Montessori teacher profession, serving 5 partner schools across the Mid-South.



Finally, our impact can also be measured in our attachment village of whole child and family supports:

- 95% family satisfaction
- 3,300+ hours per year of involvement
- 580 wraparound service referrals
- Chronic absenteeism reduced by 10% since turning around the school; our rate of 24.9% in 2023 was about 10% better than the Memphis charter school average
- Massive reduction in exclusionary discipline
 - <2% suspensions in recent years
 - Zero expulsions in 9 years

% of Families Who Are Engaged	99.7%
# of More-Engaged Families (excluding conferences)	322
% of Families Who are More Engaged (excl. Conferences)	92.8%
Family Engagement Hours	3308

B. Address progress toward meeting the academic goals outlined in the current charter agreement. Were any amendments made to academic goals? If so, explain.

We remain focused on the same fundamental goals outlined in our initial charter: providing rich and personalized learning through Montessori and Core Knowledge, aligned to state standards, while fostering student character virtue and an attachment village of wraparound supports. Most of the measures outlined in our charter continue to be applicable, and in the response above we provide extensive information on performance toward those national,

state and local academic measures.

To the limited extent that any adjustments have been made to specific academic targets, it has largely been in response to changing requirements from the state or district, such as the change in standards and assessment from TCAP to TN Ready; adjustments made over time by TDE to the TN School Improvement Plan; AMO adjustments made annually by the state; new School Performance Framework; and so on. We have also slightly adjusted our NWEA MAP goals to include not only 100% average growth but also 85% of students making 50%+, and 50% making 100%, of individual growth goals, and applying this also to each major subgroup.

We have made limited adjustments to some of our internal, curriculum-based measures. In the original charter we defined a specific set of what we called flexible benchmark assessments, based on Montessori scope and sequence and CKLA grade level material. Those exact benchmarks are no longer in use because of the change in external goals mentioned above as well as the further academic alignment “roadmap” work we have done in subsequent years; however the spirit is still reflective of our approach - guiding teacher and learning with formative assessment including observation of curriculum-based student work. One refinement along these lines has been adopting the Montessori Phonics Screener as a granular way of tracking early reading. We demonstrated this system to the TPCSC on-site observation team during our 2022 and 2023 site visits; a specific set of grade-level aligned goals based in a curriculum-based scope and sequence are assessed every 6 weeks and used to adjust teaching; we aim for 90% of students to make year-end goal for reading on grade level (see below) or make over one years’ growth. Another example of how we have adapted and refined our curriculum and assessment approach is by creating math task cards and interim assessments, and our new upper elementary science and social studies quarterly projects and exhibitions. Some of these items are further addressed below in the assessment section. Likewise we also embraced TN PreK/K Portfolio assessment for early childhood (see below). Also see section J (areas of concern and changes made) regarding some fine-tuning we have done to our implementation. Again, these are all in the same spirit and strategy as the original charter plan.

It is worth noting that the whole state of Tennessee has had a sobering experience with the difficulty of turning around chronically underperforming high-poverty schools, as well as meeting the rigorous performance levels on the TN Ready tests implemented with the new standards embraced right around the time of our charter approval. (According to a [linking study](#) (see page 15), students must be at about the 75th national percentile to be proficient on TN Ready.) Thus neither our school nor the state have yet reached original stated objectives.

However we celebrate the substantial progress that we have made, while remaining dedicated to continuous improvement to fulfill our students’ potential.

- C. Outline the school's assessment system and explain how assessments are used to inform instructional practice, evaluate teacher effectiveness, and implement professional development.

Many schools have confusing and ineffective amalgams of assessments that may not cohere with their program. In a meta-analysis of several education research studies over the past generation of school reform, scholar David Squires concludes, “the research demonstrates that school districts can improve student achievement by ... aligning their written, taught, and tested curriculum.”² Specifically, the study suggests aligning the taught curriculum to standards and assessments by featuring “tasks that encompass an objective and how that objective will be demonstrated in instruction.” The research cited “promised better student results if instruction aligned practice with test items as well as the concepts the items tested, particularly for low-aptitude students.” And it recommends a “management system” and formative “common assessments... to know that the curriculum has been both taught and assessed while providing grist for data teams to make sense of the results” (Squires, 133-4). Finally, the analysis names the *Understanding By Design* model as one of the few design approaches that “actually incorporate[s] alignment into a curriculum design that makes sure that what is tested gets taught” (129). This research meets the ESSA requirement for at least Tier II “evidence of statistical correlation, with controls for selection bias, that an intervention is likely to improve student outcomes.”³

This research encapsulates our curriculum and assessment strategy. Beginning with the end in mind - enduring understandings in our broad curriculum, along with standard expectations - we have selected, adapted and created a combination nationally-normed and curriculum-based and internal assessments to ensure that students are progressing toward the goals of our summative assessments (TN Ready), and guide teachers and administrators in making course corrections as needed. These cohere with our Montessori curriculum or with curricular extensions we have designed to address any identified gaps.

- **Observation:** observation of student work conducted by trained Montessori teachers based on their meticulous implementation of time-tested curricula is a key feature.

² Squires, David, “Curriculum Alignment Research Suggests That Alignment Can Improve Student Achievement.” *The Clearing House*, 85: p129–135, 2012. Abstract accessed 10/18 at <https://eric.ed.gov/?id=EJ965707> Full text available in hard copy on request.

³ “When instruction aligns with assessment, large gains over a control group (instruction with no alignment) appeared across studies, with effect sizes ranging around four times what traditional instruction produced—effect sizes ranged from .25 to .50—or for instructionally aligned instruction and assessment, meaning that a student scoring in the 50th percentile would increase to between the 84th and 98th percentile.” Squires, 133. Here the meta-analysis substantiates its claim with references to other studies including, among others: Elia, J. S. I. 1986. “An alignment experiment in vocabulary instruction: Varying instructional practice and test item formats to measure transfer with low SES fourth graders.” Unpublished doctoral dissertation, University of San Francisco. Cohen, S. A., and G. Stover. 1981. “Effects of teaching sixth grade students to modify the variables in math word problems.” *Reading Research Quarterly* 16: 175–200.

Especially when done by a teacher working with the same child for 2-3 years, these are perhaps our most useful tool.

- **Montessori phonics screener:** A curriculum-based tracker for growth in letter-sound correspondences, phonemic awareness & decoding. Teachers use this to make week-to-week adjustment in lesson plans. We find that this correlates with growth on state and national assessments. See below for extensive details about this model.

Phonetic Reading: End of Year Goals

Phonics Assessment

Grade Level	End of Year Goal		
PreK	75% of children	know 80% (21) of 26 Single-Letter Sounds	
Kindergarten	90% of children	pass Level 1	
	70% of children	pass Level 3	
	50% of children	pass Level 4	
1st Grade	80% of children	pass Level 7	OR grow 5 levels
2nd Grade	80% of children	pass Level 9	OR grow 5 levels
3rd-5th Grade	90% of children	pass Level 9	OR grow 5 levels

Phonetic Reading: Checkpoint Goals

Grade	Oct	Dec	Feb	Apr	May
PreK	+4 letter sounds	+4 letter sounds	+4 letter sounds	+4 letter sounds	+5 letter sounds <i>(Total +21 sounds)</i>
Kinder	+13 letter sounds	Pass Level 1	Pass Level 2	Pass Level 3	Pass Level 4
Accelerated Kinder	Pass Level 1	Pass Level 2	Pass Level 3	Pass Level 4	Pass Level 5
1st	Pass Next Level	Pass Next Level	Pass Next Level	Pass Next Level	Pass Next Level <i>(Total 5 Levels)</i>
2nd	Pass Next Level	Pass Next Level	Pass Next Level	Pass Next Level	Pass Next Level <i>(Total 5 Levels)</i>
3rd-5th	Pass Next Level	Pass Next Level	Pass Next Level	Pass Next Level	Pass Next Level <i>(Total 5 Levels)</i>

Phonetic Reading: Approximate Correlations

Grade		Phonics Sequence Level	Skills Covered	Waseca	CKLA
Kinder	Beginning	1	Letter sounds, beginning blending VC & CVC words with all short vowels	Red	K.6
	Early	2	Blends and glued sounds with short vowels (-am, -all, -ng; ss, ff, ll, ck; 's' as /z/)	Orange Yellow 1-2	K.7
	Mid	3	Consonant Digraphs, Vowel Digraphs (ch, sh, th, ee, oo)	Yellow 3-7	
	Late	4	Vowel Digraphs (C <i>Ve</i> , ay, ie, oa, oy)	Aqua	K.10
1st	Early	5	R-Controlled Vowels and Inflectional Endings -ED and -ING (ar, or, ir, er -ed, -ing)	Purple 1-3	1.4
	Mid	6	Vowel Digraphs, Inflectional Ending -ES, 'y' as /ee/ (aw, ea, ow, ue, es, 'y' as /ee/)	Blue Purple	1.8
	Late	7	Advanced Consonant Sounds, Soft G and C ('y' as /ie/, -ly, -tle/-le, 'c' as /s/, 'g' as /j/, wh)	Pink Gold	1.5 1.6
2nd	Mid	8	Advanced Vowel Sounds (ight, ind, sion, ous, ear, alk, tion, ign)	Blue Purple Gold	2.5
	Late	9	Vowel Homophones (oi/oy, au/aw, ou/ow, ai/ay, ew/ue, ph/f)		2.6

Note: The sequence of sounds introduced is not the same in the three systems. The goal is not to try to synchronize them. Having them appear in different orders will serve as an effective spiral. The teaching order should follow the nine levels of the Phonics Sequence because the assessment is based on that sequence.

- **Grade-level reading:** A curriculum-based internal measure of decoding, fluency, and comprehension, using CKLA readers, a TN-approved high quality literacy material. We find that this correlates with growth on state and national assessments.
- **Grade-level writing:** An internal evaluation of writing in response to reading content embedded within CKLA, as measured by state rubrics. Teachers are trained to analyze student work samples. We find that this correlates with growth on state and national assessments.
- **Math snapshots/quizzes:** Internal measure of math proficiency based on questions from TNReady item bank. We developed these using the state item bank but tied them to individual standard-level and problem-level checks for understanding using Montessori works that teachers can integrate into instruction and student practice on a daily/weekly basis. In addition to the underlying academic skill or knowledge, students also learn to perform on less familiar testing formats: unpack word problems, find multiple pathways to solutions. We find that this correlates with growth on state and national assessments.
- **Aimsweb:** A required RTI progress monitoring tool; used to inform Child Study and performance management of intervention staff.

- **Brigance:** A comprehensive developmental assessment administered three times per year to PreK. This is a requirement of our local PreK funding; teachers use it to inform curriculum planning.
- **PreK & Kinder Portfolio:** A robust assessment based on normed peer review, based on TN Early Learning standards, utilizing student work samples drawn from our curricular sequence; collected at different points throughout the year; the fall collection provides a good check point for teacher review and planning; the end of year collection generates teacher effect size scores that we include for performance management. We incorporated Portfolio as our mission-specific goal with the Commission for reasons outlined in our approved application.
- **NWEA MAP:** A nationally-normed assessment that serves as our required “universal screener,” administered three times per year to K-5th grade (and soon middle school grades) in both ELA and Math. Helps us to track how well our curriculum is translating into nationally-normed growth, and projected TNReady proficiency (note that students must be at about the 75th national percentile to be proficient on TNReady)

Our use of data from across these assessments for instruction, evaluation and professional development has been exhaustively documented in our district- and state-approved TN School Improvement Plans over the last several years, and in our 2021 TPCSC charter application. In brief, our instructional leadership team meets every week to review formative data tracked in our dashboard; they facilitate biweekly individual checks-ins with every teacher, and multiple monthly teaching team lesson study meetings; and every six week data review sessions. Trends are reviewed and adjustments are agreed upon for teaching and training sessions. We also formally solicit quantitative teacher feedback 3 times per year on surveys of their satisfaction with our coaching and PD processes. Along with objective data on student growth and achievement, these sources help us triangulate the efficacy of our instructional leadership approach. For further information, please see the next section below.

D. Describe how the school uses other data (qualitative and quantitative) to evaluate the effectiveness of the academic program.

Libertas maintains a robust data dashboard to monitor data to inform professional and curriculum development, restorative behavior intervention, attendance intervention, and other needs. With support from our partners at United Infolytics and InnovateEDU, the dashboard is comprised of an interlocking series of systems, including PowerSchool, EIS, Google Spreadsheets, NWEA MAP, classroom observation and lesson planning tools, our financial software, behavior and family engagement systems, all built together with Ed-Fi protocols. All indicators are planned, monitored and responded to through the analysis and action-planning stages of our data-driven instruction and leadership cycle.

Our school has a comprehensive team (the “Faculty Council”) and structure for ensuring alignment of continuous school improvement efforts across all aspects of our organization: academic, culture,

operations, human systems. Our team is chaired by the Executive Director and consists of key staff and families. The Executive Director reports upward from the SIP team to our Board of Trustees, which acts as the final oversight for school level efforts. Finally, the team gathers input from, and cascades down to, the various individual support roles and teams within the school (e.g. grade level teams, special ed team, culture / discipline team, office / operations team, etc). Our school improvement team operates through a series of structures to maintain alignment, and a dashboard to monitor fidelity of implementation, illustrated in the table below:

Organizational alignment structures to monitor school goals and implementation			
<u>What</u>	<u>When</u>	<u>Who</u>	<u>Why</u>
School improvement plan	Annual	School improvement team	Overall goal setting and initiative planning
Reflective step-back	Three times annually	School improvement team plus other teachers / staff	Discuss what metrics are we hitting or not; big-picture adjustment
Monthly strategy session	Fourth Mon. 2 hours after school	School improvement team	Monitor dashboard and deep-dive into current issues to solve
Weekly tactical ops meeting	Every Mon. 1 hour at lunch	Subcommittee of 5 top leaders from team	Week to week tactical adjustments to implementation
Academic committee	Twice monthly (1st & 3rd Mon after school)	Subcommittee of school improvement team	Synthesize classroom observations to plan professional develop
Daily huddle	7:30 every day	All staff	Top things today to get better
Board meetings	Alternating months, (first Mondays at noon)	Board of Trustees and Exec. Dir.	Oversight of operations
Performance management	3x annual cycle (Sept, Jan, May)	All employee, managed by top leaders	Ensure everyone has support aligned with school vision and plan
Classroom observation & coaching	30 min. observation and 30+ min. coaching every one to two weeks	Consulting teachers (coaches)	Ensure alignment of daily classroom instruction with academic roadmap
Professional development	2 hours every week, 10+ days yearlong	All teachers/staff, led by turnaround team members	Constant learning of content and pedagogy to meet student needs
Child study	1 hour weekly	Grade teams, led by turnaround team members	Ensure action for individual struggling students
Dashboard	Live update daily	School improvement team	Monitor leading indicators of progress and flag need for adjustment

All of these structures and processes ensure that the decisions we're making as a school best support the academic growth and overall well being of the students we serve.

E. Discuss progress made toward closing achievement gaps.

Libertas serves a relatively high at-risk student population, with roughly 86% eligible for free- or reduced-price lunch (with about 50% being directly certified as economically disadvantaged), and about 18% with IEPs (but with nearly 10% of students over the last few years having high-need IEPs). Our unique personalized and multi sensory learning model has been highly effective at ensuring at-risk students grow and achieve at a higher rate than their typical or more advantaged peers. Please see section A above for extensive details about consistently high academic growth and high achievement across state accountability indicators for these subgroups. In short, we have earned TVAAS 4-5 every year for these subgroups; exceeded not only MSCS but also the statewide average *and* even a privileged district like Collierville among ED students in ELA in 2023; and performed in the top 15% of the state for ED and SwD subgroups in the previous two years.

F. Outline leader and teacher professional development and its impact on student achievement.

We have an extensive professional development plan that we have detailed on multiple occasions, such as our 23/24 state- and district-approved School Improvement Plan.

We offer a comprehensive model of job-embedded support for serving at-risk students to ensure high-quality teachers and assistant teachers**, including: intensive initial training; annual, monthly and weekly PD; and weekly coaching. It begins with 250 hours of in-depth training in Montessori pedagogy and curriculum, aligned to state standards, and explicitly addresses how to reach at-risk students. This foundational training (Arete Memphis Public Montessori Residency) - which is nationally accredited and state licensed - is 250 hours for new classroom teachers, completed over the course of the first two summers and weekend seminars in between, and 40 hours in the first summer/year for new assistant teachers. We continue our support through 150 hours of professional development and coaching throughout each school year, including 10 full PD days, plus one hour of PD each week, and one hour each week for observation/coaching sessions for each class. Highlights of our training program includes 70 hours (39 synchronous & 31 asynchronous) of sessions addressing whole child needs, including The Learner & Learning, Child Case Study, and Montessori Strategies for Children with Learning Differences. These courses address learning differences, RTI, accommodation and modification of lessons, behavior strategies, and best practices in reading instruction. Another 14 hours address Culturally Responsive Mindset & Practices, such as activating cultural knowledge, prior experiences, and frames of reference of diverse student groups to make learning encounters more accessible and effective for them. And to support the academic and social development of ELLs, best practices, aligned with reading and content standards, and tools for developing academic talk and instructional conversations in the classroom are presented. Trauma Responsive Practices is a 10 hour component addressing what trauma is, what the effects can look like in children, and targeted suggestions for creating trauma-informed classrooms that address social-emotional needs. We monitor the quality of our approach by teacher surveys three times per year (similar to our parent survey schedule), along with student outcomes; we also look every week at teacher

lesson plans and lesson observation quality, using a Montessori Teacher Appraisal Instrument-based internal tool; as well as TEAM observations.

G. Explain how the school supports diverse learners.

The Special Populations section of our state-approved 2021 Commission charter application provided a detailed 6 page overview of our approach for diverse learners and remains essentially current; some updates were also provided in our 2023/24 approved School Improvement Plan.

In short, Libertas has for nearly a decade been dedicated to embracing and accelerating diverse learners. Our multi-sensory, multi-age, inclusive classrooms have become a magnet for families (and other schools) looking for places to help young children with significant disabilities thrive. We welcome these families starting with our marketing materials.

Our team includes seven special education certified teachers (with an average of 10+ years of experience), five paraprofessionals, a nurse / health services advocate, Applied Behavior Analyst, licensed Counselor, Social Worker, and contracted clinical service providers: two full time speech language pathologists; full-time occupational therapist; part-time physical therapists; part-time psychologist. We boast longtime partners such as LeBonheur Children's Hospital, UT Health Science Center, Anaya / Youth Villages, and University of Memphis Social Work Department.

We offer a continuum of services and supports, including three different self-contained classrooms, resources, several inclusive classrooms with special education teachers and/or paraprofessionals as co-teachers or assistants. Students in more restrictive settings have significant opportunities with general education peers, and plans outlining the criteria and indications for transition into inclusion.

Consistent with our principles, our approach to persistent or significant behavior challenges is restorative: if something is broken—be it a classroom material or a friendship—we need to fix it. Our recovery room is staffed with some of the aforementioned social-emotional support staff, who can help children to recover, re-engage, restore, and families to reconnect. We see past behavioral symptoms and work on the attachments and developmental skills really needed. We train our teachers annually on these mindsets and practices.

We also have a 4-person family engagement team that not only manages registration and attendance but also offers a wide array of wraparound service referrals - over 500 per year - and proactive relationship building. We offer an array of screenings (such as health, vision, dental, and hearing) and services (glasses, immunizations, mental / behavioral health, individual / group therapy.) We seek to earn families' trust, and reduce the communication barriers that often make it difficult for families who are experiencing trauma or adverse childhood experiences to seek help or work with the school on barriers their children may

face in accessing school. Consequently our rate of discipline remains among the lowest in the district.

We have a Child Study team (interdisciplinary intervention steering group) to make sure all supports are coordinated.

We proactively work with our schools in our neighborhood and offer placements for students whose IEP teams determine our school is a better fit. Just this year we offered spaces to three early childhood students with disabilities from another TPCSC school, and are currently effectively serving them.

Because of the demographics of our neighborhood, historically we have had few English language learners; in the last two years we have served 1 ELL each year. Yet we are fully prepared to meet the needs of ELLs choosing Libertas. Our staff includes a certified ESL instructor. When our enrollment process identifies an ELL via the home language survey, it triggers our process, including all of the strategies, policies, supports, and assessments, e.g. WIDA screener. We are compliant with all state policies and procedures regarding ELLs.

As detailed in section A above, our SwD have outperformed typical peers on TVAAS and MAP every year.

J. Discuss areas of academic concern and changes made to address any deficiencies.

Math Proficiency

Over the last 9 years our students have shown significant growth and improvement in all areas, however math has improved somewhat less than ELA and science.

Math at Libertas is primarily taught through individualized Montessori lessons, using carefully designed manipulatives that are helpful in fostering conceptual understanding and procedural fluency. At the time of our transition from the ASD to TPCSC, students showed significant growth on both the nationally-normed NWEA MAP (averaging over 100% of their growth goals) and on TVAAS (Level 5). Nevertheless, students historically struggled to translate that into proficient performance on TNReady, manifested in lower scores especially on the “real world application” word problems—a gap we traced to inconsistent exposure to grade-level expectations.

In response, in 2019, Libertas' Academic Alignment Team undertook an intensive process to clarify our academic roadmap in math. The team crosswalked TN Math Standards and Montessori curriculum resources, identified gaps, and created strategies to address them. These included an updated math pacing plan and scope and sequence of lessons aligned to expectations for grades 1-5; Montessori-style work extensions (e.g. “task cards”) to help children practice their skills on more challenging question types; and a series of “snapshots”

and quizzes to help teachers monitor student growth not only on individual lesson sequences but also toward grade level standards.

While students continued to receive individualized, daily Montessori math lessons, we also implemented significant adjustments to our delivery methods to ensure access to grade-level content. In lower elementary classrooms, students participate in “math talks” several times per week, during which teachers guide them through unpacking word problems. Additionally, we introduced “seminar” classes for fourth and fifth grade students. These classes allocate one hour each day to separate grade-level math and ELA sessions, ensuring comprehensive coverage of Tennessee standards.

Our team also developed a training plan with frequent (two to three times per month) professional development sessions focused on math for teaching teams to collaboratively review conceptual understandings and issues, review student work samples, analyze quiz results, and plan adjustments.

As a data-driven school, we inspect what we expect. Lesson plans are due for the following week on Thursdays, leaving time for coaches to review and give feedback on Fridays. Teachers are observed at least every other week, followed by feedback / debrief sessions. Data about each part of the process—lesson plans, observations, student work progress, and quiz data—are monitored on Libertas' data dashboard to ensure fidelity of implementation.

Our roadmap work is bearing fruit. Last year 3rd grade math grew in the 94th percentile of the state. This year’s new 5th grade math seminar grew 130% of their MAP goals in the fall semester. We also this year moved one of our best performing Montessori teachers into a math specialist role to provide not only intervention to struggling students but also more challenging work to our more advanced students across all classes. Math is also integrated into our after-school program curriculum, benefiting about 10% of Libertas' enrollment, and the summer camp curriculum, which includes approximately 36% of enrollment.

In addition to 81 hours of initial training in math, teachers receive approximately 19 hours of math professional development/ coaching sessions annually to ensure they are prepared to deliver effective math instruction. Through these concerted efforts, we are committed to fostering a supportive learning environment and closing the gap in math achievement for our upper elementary students.

Achievement Gaps for Diverse Learners

Special education is arguably the most at-risk group in the state, with less than 15% reading on grade level in 2023 (lower than other subgroups such as economically disadvantaged or African American).⁴ This is a major focus for us at Libertas because, as discussed above, our

⁴ TN Dept. of Education data files:

www.tn.gov/content/dam/tn/education/accountability/2022/state_release_file_suppressed_2022.xlsx

highly unique classroom environments have made us a magnet for SwD. Families routinely seek us out; numerous other schools over the years have created partnerships with us to place their SwD at our site; and SwD are regularly “counseled out” of other schools and referred to us. As a result Libertas serves double the special education rate - and up to ten times the severity - among Memphis charters.

Even with our high growth for SwD, we still confront the gap found in the state. In ELA in 2023 at Libertas, whereas our BHN and ED groups performed very close to the school average, our SwD had a 12.7% gap. This is actually much less than the gap for SwD in the state as a whole (23 points), and we also slightly outperformed the state average for SwD in this category. Nevertheless we continue to find ways to get better every day for our students with disabilities.

In the diverse learners section above we outline our major investments and structures to support SwD learning. To ensure equitable access to education, we offer a continuum of services to meet the individual needs of our students with disabilities in the least restrictive environment. Other efforts include an additional new intervention teacher, intensified observation and feedback efforts by our Student Support Coordinator to enhance teachers' effectiveness, and launching an effort in summer 2024 to revise our teacher licensure program to include an integrated special education endorsement along with early childhood license. These efforts, combined with our continuum of services mentioned previously, have led to significant growth in this subgroup, and we anticipate continued progress.

Chronic Absenteeism

Libertas has made strides in addressing chronic absenteeism, currently standing at a rate of 25.9%, which is about 10% below the charter school average. We have a 4-person family engagement team that not only manages attendance but also offers a wide array of wraparound service referrals - over 500 per year - and proactive relationship building. The team aims to cultivate trust with families and break down communication barriers, particularly for families navigating trauma or adverse childhood experiences.

To bolster our efforts, in fall 2023 we welcomed a full-time Attendance/Enrollment Specialist to our team. She has redoubled interventions aimed at combating chronic absenteeism effectively:

- **Daily Monitoring and Communication:** The specialist diligently monitors student attendance, reaching out to Tier 2 students on a daily basis to encourage consistent attendance.
- **Strategic Mailings:** We employ targeted attendance mailings to keep families informed and engaged, reinforcing the importance of regular school attendance.
- **Early Intervention:** Students identified as chronically absent, reaching five or more days of absence, are promptly flagged and reported to the Dean for further intervention and support.

- Collaborative Approach: Any attendance concerns raised by teachers are communicated directly to the Dean of Family Engagement, ensuring a collaborative effort in addressing attendance issues.

By implementing these interventions, we aim not only to improve attendance rates but also to foster a culture of support and collaboration within our community. We understand that consistent attendance is vital for academic success and overall student well-being. We have successfully reduced chronic absence by about 10 points since turning around this school. Through continued focus and further collaboration, we are committed to further reducing chronic absenteeism and ensuring that every student at Libertas has the opportunity to thrive.

- K. Explain why the school's academic outcomes merit renewal of its charter agreement.

Libertas has quite simply been one of the most effective school turnarounds in Tennessee, and a national exemplar for rigorous and human-centered urban Montessori education. Moreover our inclusion of students with special needs and our relational school culture has fostered a learning environment that is in high demand by families and teachers alike. Libertas has all the elements in place needed for continuous improvement, and remains fully committed to human flourishing in Frayser.

Section II – Operational Stability

- A. Address progress toward meeting the operational goals outlined in the charter agreement, if applicable.

Overall we have met the operations objectives in our original charter, while appropriately adjusting them consistent with our mission as conditions have developed over time.

Our initial charter only required a staffing plan for the first 5 years. While adhering to that plan during that time, our enrollment growth exceeded expectations; demand for special education exceeded initial expectations; and development of ancillary programs. Key adjustments include designating a separate Principal from the Executive Director role (combined for our first several years); a People Officer to oversee recruitment and staff culture; a separate Finance Manager to ensure focused fiscal management separate from Operations; a dedicated Dean of Students and multi-person “attachment village” team; a larger Family Engagement team; a larger instructional team, led by a Dean and including three coaches for academic levels; a larger special education team led by our Coordinator with both self-contained and resource and intervention teachers.

We also have developed two special ancillary programs. Arete Memphis Public Montessori Residency (described elsewhere in this application and in our primary district partner agreement with TPCSC) is our dual-accredited Montessori teacher preparation program. We brought this in-house because providing comprehensive training through external providers was not only too expensive but also difficult to access. Arete has a director and several

part-time staff drawn from our team and external consultants. We also launched the Nido (“nest”) child care program is growing to serve 28 children infant / toddler / 3 year old PreK; Nido has a part-time director and a few dedicated teachers.

While bringing teacher training in-house was a significant shift in strategy and organizational scope, it has only deepened our impact and strengthened the quality of our program. Our approach to selection, performance management and compensation remain aligned with our initial charter, with appropriate fine-tuning over time.

Regarding contracted services, we continue to work with MSCS on nutrition services effectively. After initially using district busing, we created a strategic partnership with a minority/woman-owned local business that has for several years provided excellent daily and special transportation to the school. After attempting to provide technology and data management in-house via our operations manager/team, we decided over the last two years to outsource these to two reputable and high quality local partner organizations.

Regarding facilities, we purchased our facility from MSCS two years ago, and are now completing major renovations for deferred maintenance as well as an addition. We are also working on an expansion plan for our middle school. These were detailed in our approved charter amendment in 2023.

The Board continues to evaluate the executive director twice annually, regularly monitor and guide organizational initiatives and performance, and to periodically evaluate itself. See below for more details on board development. Throughout our time under ASD and TPCSC, Libertas has overall maintained an excellent record of compliance on authorizer requirements. Also see below regarding financial performance (audit, cash, etc).

B. Discuss student enrollment over the course of the current charter term. Is the school operating at maximum capacity? How many students are currently on the waitlist?

Libertas has consistently met/exceeded enrollment goals and maintained a wait list for years. The adjacent table shows our overall enrollment (average for 2020 to 2022, preliminary for fall 2023) and wait list (as of mid-fall of each year). Each of these years the wait list has exceeded 20% of total enrollment.

When we opened in 2015, virtually all students came from our zone and immediately adjacent priority zones in Frayser. Over the course of eight years, interest in our school has grown such that now approximately 15-20% of registered students come from neighborhoods beyond Frayser—primarily the low-income, predominantly African American neighborhoods of Raleigh and North Memphis, but also more economically and racially diverse areas such as downtown and midtown Memphis. Some of

Libertas wait list and enrollment 3-year history				
Wait list as of mid-fall				
Grade	Fall 2020	Fall 2021	Fall 2022	Fall 2023
PK3	9	34	38	28
PK4	8	0	4	4
K	8	17	6	9
1	10	20	12	9
2	14	22	27	10
3	11	12	17	25
4	15	16	12	20
5	5	15	8	6
Total	80	136	124	111
Total enrollment				<i>Prelim.</i>
K-5	381	396	393	414
P-5	449	488	488	515

these families are former Frayser residents returning for education now that a school appeals to them. While we obviously welcome all admitted families and integrate them into our community, our recruitment and community engagement efforts are focused almost exclusively on the Frayser neighborhood; we are utilizing the newly legislated economic disadvantage enrollment preference - something for which we have advocated in the year since, leaving the ASD, we lost the priority zone preference.

We are currently at full capacity for our building, however as detailed in our approved 2023 amendment, we are completing an expansion in summer 2024 that will accommodate opening another classroom, and then further facility expansion is in the works for our middle school grades recently approved.

Our enrollment policy is reviewed annually by TDE and TPCSC. It provides for an initial minimum 30 day application period, during which time current families are encouraged and supported to re-enroll. Then, depending on space, a lottery would be conducted by a neutral party, in which enrollment preferences are as follows (see policy for details): children of employees, students who attended our PreK, siblings, student at risk (economically disadvantaged, experiencing homelessness or in foster care, migrants), and other students residing in MSCS. When planned capacity is filled, remaining applicants are assigned a wait list number using the same preference ranked methodology; any applicants who apply after the initial enrollment period has ended are added to the waiting list in order of eligible application. Applicants have one week to accept offers, after which, if we cannot reach them, they are removed. Registration requirements mostly reflect TPCSC requirements; to reduce hidden barriers to access, we do not have onerous pre-admission activities; however we do require family orientation to our school and family compact/agreement. Note that PreK is subject to additional eligibility and related requirements related to funding sources.

C. Describe trends in student attrition and how leaders have addressed any concerns

Libertas has achieved high student persistence through strong family engagement and data monitoring. *Student Year-to-Year Persistence :*

Persistence	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Total	80%	81%	82%	82%	81%

Persistence for PreK ranges from 70-75%; the slight difference from K and above is explained by public PreK being somewhat more scarce and thus families traveling more for it and thus more likely to transfer for Kindergarten. These are overall strong numbers for a neighborhood with a 60%+ rental / mobility rate.

We have an Attendance and Enrollment Specialist dedicated to supporting Libertas' initiatives in planning and implementing re-enrollment and recruitment strategies. This specialist plays a crucial role in ensuring a healthy and growing school community.

Our Family Engagement team collaborates closely to foster student persistence. Using a detailed tracker, they meticulously monitor each student's re-enrollment status. Throughout the re-enrollment period, they reach out to families who have not yet registered for the upcoming school year to make sure they are aware of the timeline and offer support when it is needed.

- D. Explain how the school provides a safe environment and addresses the physical, social, emotional, and health needs of students.

Physical Safety

Libertas has a safety team that convenes periodically throughout the year to ensure that all procedures are up-to-date and that we conduct drills to ensure everyone is prepared. The safety members are part of a GroupMe, facilitating immediate communication regarding security concerns. Furthermore, all staff members receive mandatory annual safety training. We also conduct yearly meetings with the Memphis Police Department to review our safety plan and receive feedback. Additionally, we have established a partnership with an FBI consultant to enhance procedures for dealing with armed intruders.

In an effort to bolster facility security, we recently completed several project, including replacing and/or covering all windows with more penetration-resistant material, successfully requested and received the installation of speed bumps at our pick-up/ drop-off location, replaced all classroom door locks with mechanisms that can be locked from inside, added more security cameras and door badge readers, expanded fencing, and other measures. Also in winter/spring 2023-24 we are providing an afternoon / evening security guard.

Social/ Emotional

Reducing behavioral barriers to learning (and addressing systemic practices that may contribute to it) is an important issue in a historically “priority” school community like ours, where 24% of students were suspended annually prior to our turnaround, and some nearby schools have double that rate.

Libertas is committed to maintaining our very low suspension rate, and we attribute this success to our inclusive, restorative, “attachment” approach to supporting relationships and behavior. Our students experience a significant number of challenges living in a high poverty neighborhood that impact their readiness to engage in school. We have a positive and proactive schoolwide approach for positive behavior through our virtue study program. Developed using national models but with close collaboration with numerous teachers and support staff, our program features two weekly lessons in character development and applying it to the classroom, utilizing developmentally and culturally responsive literature and examples.

Consistent with our principles, our approach to persistent or significant behavior challenges is restorative: if something is broken—be it a classroom material or a friendship—we need to fix it. Our recovery room is staffed with social-emotional support staff, who can help children to recover, re-engage, restore, and families to reconnect. We see past behavioral symptoms and work on the attachments and developmental skills really needed. We train our teachers annually on these mindsets and practices. In addition, we are maintaining strong relationships with other key external partners, including:

- Le Bonheur Children’s Hospital (clinical therapy)
- Youth Villages (social-emotional support & mental health)
- University of Memphis Social Work department (wraparound support)
- Extensive community partnerships

These efforts are led by a Licensed Clinical Social Worker and an expert in family services.

Furthermore, we have a Child Study Team (CST) that is a cross-functional group - comprised of general and special educators, social-emotional support team members, and administrators - who work together to identify and escalate complex student issues; develop, implement, and monitor intervention plans; and refer students for additional services. This is the highest level group in the school to ensure that no student needs falls through the cracks.

Since transforming Brookmeade elementary into Libertas Montessori in 2015, our restorative, “attachment village” approach to discipline has dramatically reduced exclusionary discipline - reducing suspensions more than 90%, with zero expulsions in our history.

Health

Libertas prioritizes the physical and mental health of our students. Our physical education program offers ample opportunities for movement, complemented by the Montessori method, which emphasizes the significance of outdoor play. In recent years, we have renovated a portion of our building to include an indoor play area, providing students with a space for physical activity when outdoor conditions are unfavorable. Additionally, we have installed water bottle refill stations at all water fountains, ensuring convenient access to hydration for both students and faculty.

When students fall ill or experience minor injuries, they receive support from our School Health Advocate. We provide annual flu shots for our staff. We conduct health, vision, and hearing screenings and referrals for our preschool students. Our Family Engagement team collaborates with parents to promote student wellness through family seminars. Some of the seminars hosted this school year include a health and development early childhood workshop, an internet safety seminar, a session on caring for your family's mental health, as well as discussions on nutrition. We work with UT Health Science Center to bring in medical and nursing students and professionals to provide additional education and screenings.

- E. Explain how the school has made community connections and developed working relationships with parents and families.

Our approach to family and community engagement has been exhaustively discussed in our charter application to the TPCSC as well as our annual school improvement plans.

Our unique multi-age classrooms with multi-year looping of children with 2 teachers/adults in each class makes for exceptionally close communications between families and the school.

We have a 4-person family engagement team that not only manages registration and attendance but also conducts family partnership agreements and needs assessments, offers an extensive array of workshops and collaboration opportunities at accessible times and places, and a wide array of wraparound service referrals - over 500 per year. We seek to earn families' trust, and reduce the communication barriers that often make it difficult for families who are experiencing trauma or adverse childhood experiences to seek help or work with the school on barriers their children may face. Consequently our rate of discipline remains among the lowest in the district.

Attendance is a high priority because students must be present to take advantage of a strong academic program. There is a clear relationship between attendance and academic success. Our historical data show that students with good attendance had a 17% higher rate of meeting MAP reading goals than those with chronic absenteeism. In the last full year before the pandemic, zero chronically absent students were on track or mastered on TN Ready.

Students miss school often because of home life issues such as work schedules, student illness / health, and transportation access. We have also found a difference in the willingness

of parents to communicate with us about the nature of the challenges they face; some are concerned about whether they can trust public institutions enough to share their struggles openly (i.e. will they be reported to child services, etc).

Interestingly and not surprisingly in light of this discussion, internal data points to the relationship between attendance and family engagement. Among chronically absent children, family involvement averaged 4.8 hours for the year, whereas those not chronically absent averaged 7.6 hours per year - a difference of about 63%. On average, then, we can say that families that are less involved in school tend also to be more absent. Looking at all absence data in prior years, we find a similar small negative correlation: if your family is less involved, you are more likely to be chronically absent, and more involved families tend to get their children to school more. The correlation between family engagement and attendance is more pronounced when you look at not just overall engagement but specifically at parent-teacher conferences, which are the opportunity twice per year for the most in-depth understanding of children's development. Families of students who were not chronically absent attended about 92% of conferences, whereas chronically absent students' families attended only 78.1% of conferences - almost a 14% difference. Finally, children who were suspended had less involved families: Children with suspensions averaged just 4 hours of family engagement, versus an overall average of 7.1 hours.

Ultimately, then, we believe that underlying attendance and behavior issues is the issue of the engagement relationship between the school and the family. Does the family trust us enough to both value school attendance, share honestly about their challenges, and engage the support we can offer? For instance, when families work with us, we can identify the need for transportation accommodations, assistance with food or clothing, or whatever other obstacles are affecting attendance.

Thus we must engage families deeply to build meaningful relationships, which will unlock our ability to intervene and provide effective interventions, ultimately to help families overcome attendance and behavior obstacles to accessing and succeeding in school.

We know that our strategy of family engagement is making a difference for chronic absence. In the first four years of our school transformation, we reduced chronic absences from 36% to our turnaround to about 19% during the pandemic. Unfortunately the pandemic had a devastating impact on attendance, with children missing school for quarantines. While we deployed an intensive distance learning option during those times, we held a rigorous standard for giving attendance credit, such that attendance was difficult to maintain - despite intensive deployment of best-practice interventions by a similar team that had so much success in 2019. In 2022, we reduced chronic absences back down to 25.1%, which is still higher than preferred, but was better than the Memphis neighborhood school average (27%), 10% better than the Memphis charter school average (39%), as well as the Memphis averages for at-risk subgroups such as ED (35.6%), African American (31.1%) and SwD (29.9%). Source: [Chalkbeat, May 10, 2022](#). The rate improved slightly to 24.9% in 2023. As of spring 2024, chronic absence rate stands at around 22%.

Our family engagement team prioritizes supporting families to enhance the academic success of our students. With an extensive yearly calendar featuring multiple events each semester,

the team provides diverse opportunities for parental involvement. In a given year, offerings may include seminars on topics such as first-time home buying, financial empowerment, and supporting families with children who have autism. These events not only provide the school a chance to connect with parents, but they give parents the opportunity to connect with each other and to further develop support within their community.

The impact of our family engagement initiatives is evident elsewhere in our data, with a satisfaction rate of 97% from families who participated in a satisfaction survey at the fall 2023 parent-teacher conferences. Furthermore, 90% of our families attended parent-teacher conferences, thanks in large part to the efforts of our faculty and staff to offer flexible scheduling and multiple outreach efforts to families.

Community partnerships are central to meeting families' needs. Earlier in the application we discuss a number of our key community partners; many of them directly expressed their support for Libertas to TPCSC in the letters of support we submitted with our 2021 charter and 2023 amendment applications.

- F. Explain how the school sustains a well-functioning organizational structure that provides for personnel stability and effective teacher retention.

Libertas has a veteran leadership that has ensured stable, persistent, and effective teaching and operations.

The Board of Trustees has a majority of members who represent the school's local community, while also including a variety of occupational expertise (community engagement, development, law, finance, HR, etc). The Board maintains 100% compliance with annual training requirements in partnership with the TN Charter School Center, and evaluates itself regularly with a self-evaluation tool provided by a national charter board support organization. The Board has several active committees and regular, well-attended and -documented meetings. The Board sets key policies for students and staff, sets the annual budget and calendar, and oversees the Executive Director with twice-annual evaluations.

Key leader positions are outlined below (with overall school tenure and time in current role listed in parentheses below). The ED (10/10) oversees and supports the school Principal (8/4), external relations and development managers (5/5), finance director (1/1) and operations director (5/5), and director of Educator Preparation (3/2). The Principal oversees the Assistant Principal (1/1), and the three Deans of Academics (9/5), Students (3/3), and Families (2/2). The Dean of students runs our Attachment Village / social-emotional support team, and the Dean of Families leads the engagement work, both discussed above.

According to the TN school report card, the school retained 79% of staff for the 2020-2021 school year - during which time the ASD retention rate was 54%. The 2019-2020 staff

retention rate at Libertas was 88%. And 90% of teachers remained from 2020-21 to 2021-22. We have averaged in the upper 80s in annual retention in recent years. Staff satisfaction is high at Libertas; Inform TN shows 100% teacher satisfaction and our internal surveys show 90+% satisfaction.

This comparatively high rate has been made possible by our unique, human-centered learning model, and our large team of support staff and co/assistant teachers in every class, which make our school an attractive and sustainable place to work. Likewise our large investment in teacher training and professional development (\$10,000 per new teacher) is appealing because it is fully sponsored, and accompanied by a 3-year teaching commitment. Our Arete Montessori Residency, mentioned above, is the nation's first dual-certified urban Montessori teacher residency. Arete trains teachers for 5 partner schools in the Mid-South.

We remain vigilant to ensure a strong, diverse pipeline of qualified teachers. Arete was designed specifically to lower barriers to access to public Montessori teaching for candidates from our community. This strategy allows us to invest in candidates who are committed to our community as well as our school philosophy. The program also provides an advancement pathway for our teaching assistants who are a critical part of our educational program model. In the pilot years of this initiative, we have already promoted several teaching assistants into full teacher certification. This is also helping us increase the representation of the community in the teaching force: our school has almost 36% more African American faculty (56%) than the average Montessori school nationwide (20%).

Another promising initiative for teacher recruitment and retention is our licensed infant and toddler day care, the "Nido" (Italian for "nest").

Libertas has a strong record over nine years of ensuring qualified, certified teachers are in place. We have essentially 100% certified teachers every year. In addition to licensing teachers through our rigorous Arete program, we monitor all current teacher licenses in a database kept by our HR specialist who helps teachers to document and keep current their licensure status.

Libertas uses the state's TEAM evaluation model to evaluate teacher effectiveness. This model has proven suitable for helping teachers to work at a high level on conventional measures while also accommodating unique aspects of Montessori pedagogy.

We have begun building capacity among our support staff in preparation for our middle school expansion. We hired a full time operations manager following the promotion of our Director of Operations to People Officer. This ensures we have a clear owner for finding, keeping and developing our team. We engaged United InfoLytics, a data / SIS consulting firm. We hired a full time Finance Manager to replace our retiring part-time Controller. We hired a full time compliance/external relations manager. We hired a full time student records specialist to expand our family engagement team and free up our Dean to expand family engagement /

wraparound services and ensure we maintain strong student recruitment and enrollment. We finalized an MOU with the University of Memphis Social Work program to provide one or more interns to supplement our student and family services. We maintain strong relationships with other key external partners, including Le Bonheur Children's Hospital (clinical therapy), Youth Villages (social-emotional support), Rapid Route (school transportation), Memphis Shelby County Schools (nutrition).

G. Describe the development of the board members and school leadership during the current charter term.

As noted above, Libertas is registered through the Tennessee Charter School Center to offer 4-6 hours of annual training to Board members, pursuant to [Tennessee Code Annotated 49-13-111\(q\)](#). We comply with this every year. We continue to recruit new board members and add a couple of folks every couple of years as some more experienced members complete their service, but always maintaining continuity.

The ED completed school leadership training with the TN Charter School Incubator and continues to receive periodic development from a board member with experience as an executive coach, as well as part of a cohort of school leaders through Charter School Growth Fund.

The Principal received leadership training through Relay GSE leadership training program. Several other leadership members have received leadership coaching from a locally-based, nationally-recognized consultant (Dr. Mike Brown) and another national consulting group (Figment Solutions); with these two partners, we just last year launched an in-house leadership training track, which eight mid-level leaders are now participating in. Our new middle school director also is completing training/coaching this year through Build.Excel.Sustain

H. Describe any facility changes/improvements and their impact on achieving school goals.

As an ASD-authorized school, Libertas occupied the Brookmeade Elementary school building at 3777 Edenburg Dr, 38127. At that time, we were renting and Libertas was responsible for utilities and routine maintenance. While the owner (SCS) made some limited capital repairs during our occupancy (after extensive advocacy on our part), Libertas also made other necessary and significant capital repairs that SCS had not been able to complete due to their funding constraints. In 2022, we were in a healthy enough financial situation to purchase the building. Since the purchase, we have made significant repairs and improvements to enhance the functionality and life span of the building, including \$10 million in replacement of roof, HVAC, and a building addition to provide additional classroom and special education support

space, and renovation to create an indoor PE/recess area. These will hopefully reduce distractions and save maintenance costs in the years to come, while also allowing us more space for our existing cramped enrichment, special education and early childhood programs, and finally for the expanded elementary enrollment outlined in our 2023 amendment.

Please see the “future plans” section below for more details on our expansion plan.

- I. Explain why the school’s operational condition merits renewal of its charter agreement.

Libertas has met operational goals and compliance expectations every year. Our goal-based planning and robust data monitoring system serves as a vital tool in identifying areas in need of intervention and facilitating informed decision-making. This data-driven approach allows us to adapt and respond effectively to the evolving needs of our students. We demonstrate a reflective continuous improvement process to adapt to changing circumstances, from our academic alignment work to revision of organization chart to expanded safety/security systems to creation of teacher training program. We have built a support staff that has accelerated academic performance while including diverse student needs and making for a high-retention teaching and work environment. We are good stewards of our resources and maintain transparent financial records; our financial stability has enabled us to invest in essential resources and materials that enhance the overall educational experience for our students. We have successfully identified an array of supporting resources and partners,, enabling us to expand beyond what would otherwise be possible. Meanwhile, our compliance team ensures that we remain in alignment with state and charter requirements, working to uphold high standards of accountability and integrity. Our Board and veteran leadership have ensured steady progress in line with our mission over our last 9 years, and put us on a trajectory for continued improvement over a next charter term.

Section III: Financial Health

- A. Address progress toward financial goals in the charter agreement, if applicable.

We provided an extensive update on our financial situation and trajectory in our 2021 charter application with TPCSC, and to date we remain essentially in line with that plan, with the exception of the updates we included in our 2023 approved amendment application for our middle grades expansion. We have maintained financial health and compliance every year of our charter.

- B. Report on the fiscal management of the school during the current charter term based on previously submitted audits, including A-133 audits if applicable, and financial reports.

Libertas goes into this application for renewal in a healthy financial position. We have had clean audits every year, for our entire nine year history. We finished fiscal year 2023 well

within budget. We currently have approximately 180 days' worth of cash in the bank. The year before last we acquired ownership of our facility, and secured excellent financing terms (prior to interest rates rising) - a \$5.3 million tax exempt bond at just 3.25% - combined with about <\$5 million in grants and fundraising to complete a \$10+ million comprehensive deferred maintenance renovation and addition of our facility; these projects are proceeding on-time and on-budget. Our long-term forecast now includes a manageable amount of \$325,000 annually in debt service - equivalent to just 5% of our recurring public revenues from state, federal and local sources for PreK-5th grade. While there are always variables and risks (such as the large cash flow needed given the timelines to receive state grant funds), we are in a strong financial position.

Since inception we have maintained a strong finance committee, with experts from banking, nonprofit governance, and corporate finance ensuring guidance and oversight for the school.

Our ED has extensive experience in operations and finance management at the CMO and district level and is highly engaged in our financial management.

We maintain relationships not only with an external auditor but also with separate accounting / financial management experts. In our early years we outsourced this initially to White Tankersley & Davis, then for a couple of years to W Squared when we outgrew WTD, and then to GT3 partners when our growing size and complexity required even more charter-specific expertise; and finally Afton Partners to help specifically with our middle grades expansion. These are among the most respected consultants in the field.

Our internal director of operations served for most of this time as the day to day contact with these partners. Two years ago we decided based on advice from GT3 to hire a dedicated finance director/controller as an internal team member. We now have a combination of in-house expertise and external partners to help monitor and operate our finances.

Looking ahead, with the assistance of school finance experts at our partner organizations, we have developed a sustainable financial model reflecting the impact of the proposed amendment. Startup and ongoing costs were enumerated in our amendment and continue to be refined and offset with anticipated ongoing or startup funding.

C. Address the alignment between expenditures and the school's mission, plans for student academic growth, and staff professional development.

With our 2021 charter application and 2023 amendment we provided extensive narrative of our financial plan. Our spending closely aligns to our mission of being a public Montessori school inclusively serving an at-risk community and supporting teacher development.

- We have class sizes of 20-24, and every class has a second adult - co-teacher or assistant teacher - to ensure a high level of personalized support for students (also teachers' work is significantly more sustainable because of our assistant teachers and support services.) This is the #1 unique factor in our budget.
- Our teachers earn at least as much as they would earn on SCS' currently published pay scale. Our assistant teachers earn salaries equivalent to \$15-18 per hour, which is competitive in our region.
- For full time staff, in addition to the State pension plan for certified teachers, we offer another retirement plan for non-TCRS employees, and miscellaneous fringe benefits (life insurance, etc). We provide PPO quality plans for all full time employees and their families at approximately 75% subsidy. This is another major investment that is family friendly and supports retention of high quality staff.
- Because of our unique academic model, we employ two in-house substitutes, and also student monitors who provide breaks to teachers and assistants for lunch etc, and assist with ensuring ratios are maintained for PreK during transition times.
- Special education includes multiple self-contained teachers and (currently) as well as consultative teachers who provide push-in and pull-out services for students in inclusion classes.
- Special education assistants include three self-contained classroom paraprofessionals plus one more itinerant position that supports inclusion as needed.
- Contracted services of roughly 150,000 per year with Le Bonheur Children's Hospital and Anaya / Youth Villages provide speech-language, occupational and physical therapy and related clinical services, along with licensed counseling, to our large special needs population
- Intervention: we have multiple additional RTI teacher positions.
- "Attachment village" team includes 4 people providing social-emotional and behavior support through restorative methods to students and families.
- Family engagement team includes four members providing wraparound supports
- We have four enrichment teachers: PE, music, library, and Latin.
- Instructional materials: Every new classroom is provided with approximately \$25,000 of investment in Montessori curricular materials, maintained each year with \$100 per student budget
- Transportation: we spend over 130,000 annually with a local woman/minority-owned business ensuring that at-risk students can make it to school

The areas above all reflect our commitment to a rich and personalized education experience. In addition, the following expenditure areas further demonstrate our commitment to student academic growth and staff professional development:

- We sponsor 100% of teachers' Montessori teacher training cost (valued at \$10,000) in exchange for three years of service.

- Our Arete Residency has one full time and a couple of part-time personnel supporting our cohorts of adult learners.
 - All assistant teachers also participate in the equivalent of one full week of paid professional development in Montessori methods
 - Our Instructional support team includes curriculum alignment, pedagogical coaching, and data positions.
 - New (2023) data consulting contract with United Infolytics, a student information and data warehouse organization, as well as TechLab, a school technology support vendor
- See section 4 below for further details about financial points on our growth plan.

D. Review how any significant fiscal challenges were addressed during the current charter term.

Two main fiscal challenges were faced during the initial charter term.

First, for years we spent significantly more addressing special education needs than was provided by the flat BEP funding model. We addressed this first by successfully negotiating for the creation of a weighted special education funding model within the ASD, and then advocating for the creation of TISA, which provides recurring public funds based on student needs.

The second major concern was the facility. Brookmeade school building is 64 years old, and had suffered from hundreds of thousands of dollars of deferred maintenance over the years prior to our turnaround. We had frequent roof leaks and inefficiencies with the utilities. But without capital dollars or even ownership of the building, it was difficult for us to fund these needs. We addressed this by advocating successfully for the purchase of the building, and for county capital funds toward certain repairs, and finally by securing a combination of loan funds and fundraising to address deferred maintenance.

E. Describe efforts to operate the school in a financially sound and transparent manner.

As noted above, our finances are guided by an experienced Board finance committee, overseen closely by our executive director, and have been conducted first by expert consultants and more recently by our dedicated finance director. We provide regular detailed monthly analysis to board members and internal management stakeholders to ensure we operate in accord with procedures and the budget.

We budget revenues conservatively with a 2% ADM discount on state funds, and manage expenses conservatively with a cash reserve that exceeds the requirements of the TPCSC SPF.

F. Explain why the school's financial condition merits renewal of its charter agreement.

Overall Libertas has demonstrated sound financial management. We have clean audits every year (most recent 2023 audit appended), a healthy cash balance, multi-year projections showing appropriate surpluses, contingency in place to address issues, and management systems in place to identify issues and resolve them before they become crises. Our spending priorities reflect our dedication to maximizing the impact of our investments in academic programs, professional development, infrastructure, and student support services. Strategic allocation ensures resources are efficiently used to meet student needs and further our mission.

Section 4: Future Plans

A. Academics and updated academic benchmarks

Libertas is a mission driven organization that is also very explicit about measurable goals and objectives and monitoring data to stay on course. We submit to TPCSC not only our annual school improvement plan, which includes a variety of goals aligned to state expectations, but also evidence of quarterly internal stakeholder meetings for goal setting and monitoring. Annual goals and benchmarks include the following:

- Achievement: increase percent of students achieving on track or mastered on state assessments in ELA, math, science and social studies an amount designated each year based on prior year / cohort performance (e.g. in 2024 ELA 26, Math 20, science 23; social studies N/A until 2025 with advent of 6th grade)
- Growth on state assessment: exceed expectations on TVAAS (4 or 5)
- SwD growth: 100% meet IEP goals; \geq typical peers on TVAAS & MAP
- SwD access: ensure time in GenEd environment 34-45%
- RTI growth \geq typical peers on MAP; analyze RTI movement quarterly
- NWEA MAP growth: 100% average growth (all/BHN/SwD/ED), with 85% making 50% of goal, 50% @ 100%
- (Forthcoming) Middle grades quarterly formative assessments - to be finalized spring 2024 and included in 24/25 school improvement plan
- Comparative performance: meet/exceed resident LEA performance in state assessments above
- Fidelity of implementation: 90% of lesson plans on-time and aligned to our Montessori-based, standards-aligned academic roadmap scope and sequence
- Coaching: staff satisfaction 80%
- Teacher effectiveness: TEAM observations average 3+, Portfolio 5
- Homework 70%
- Phonics: PreK: 75% know 80% | K: 90% pass level 1, 70% level 3, 50% level 4 | 1st-5th: grow 5 levels OR 1st 80% level 7, 2nd 80% level 9, 3-5th 90% level 9
- Brigance assessment (PreK): increase average national %ile by 15
- "Kinder readiness": 50% PK completers @ 50th %ile MAP fall reading
- Student writing: grow 1+ point on state rubric from fall to spring (monthly samples)
- 100% of students have access to enriched learning through weekly arts &

- SEL/character instruction, and 10% access after school learning/tutoring
- Chronic absence: reduce by amount designated each year based on prior year / cohort performance (eg <23% in 2024)
- Suspension rate <3%
- Family satisfaction 90% with 85% participation
- Family engagement 90% / 3,000 total hours
- Family partnerships: 80%, 80% screenings, 500 referrals/year
- Enrollment/persistence: maintain persistence of 75-80%+; variance <5% from budget
- Teacher retention: maintain at 85-90%
- 100% licensure compliance
- 90% Teacher satisfaction with school supports (special education, behavior, operations) and overall
- Compliance: TPCSC reporting calendar items 95%+ on-time and meeting expectations
- Operations help desk: 90% on-time resolution rate
- Financial performance: fulfill SPF and debt covenants for current ratio (1.1 or 1.0 with positive one year), days cash on hand (60+), positive cash flow, total margin, debt/asset ratio (= <0.9), and debt service coverage (1.1)

B. Organizational changes (if applicable)

No major organizational changes are contemplated at this time, beyond the modest adjustments in our organizational chart outlined above and discussed in our approved charter amendment application. A new middle school academic position is being added, reporting to the principal; additional members of the family engagement and attachment village teams also will be phased-in over the next two years to support the new students and families; a new director of operations is being hired now, separate from the People Officer / Assistant Principal role, to ensure leadership level positions on both HR and operations; an in house finance director position was brought on two years ago as noted above. New contracts with TechLab and United Infolytics are supporting technology implementation for middle grades digital literacy and testing, and expanded formative assessment data analysis, respectively. Additional board members have been added or are being recruited to help support the growth, with a focus on technology and finance.

C. Expansion (if applicable)

Details of our expansion - a small increase in elementary seats and the addition of new middle grades - was thoroughly detailed in our 2023 approved charter amendment application. Addition of these grades will help provide quality seats in a neighborhood with a documented inadequate number of quality options, and help our students both stay in the neighborhood (instead of scattering across two dozen different middle schools, mostly outside Frayser) and have a more personalized educational experience.

D. Facility improvements

Please see above for discussion of our facility plans. In short, the impending completion of our \$10 million deferred maintenance and addition plan at our original school location will secure this facility for the long-term.

In our charter amendment, we outlined our future plan, including a <2 year incubation plan for the new middle grades in our new addition, and then three scenarios for our long-term housing of this expansion so that the addition space can be used by expanded elementary needs. Our current top choice for a location to support the proposed expansion is based on extensive analysis of a suitable property in extremely close proximity to our current site. We have begun an engagement with the owner about possible terms, with the help of a commercial real estate broker. This site would provide more space for lower cost than a further addition, and is so close as to make it almost feel like one extended campus. While this seems likely to move forward as of this date, if it is off track by summer 2024 we will move ahead with a second phase addition to our building. Our architect has already done a conceptual design, and our contractor has already estimated the cost. We are assessing the viability of this scenario in relation to other options. If for whatever reason this was not possible, a final option is at a close community partner organization in Frayser with a currently unused educational building. Our architect has inspected this site and identified what work would be needed to make it suitable. We have a timeline for assessing each option and know when we need to finalize and move forward in order to be ready for operations based on our choice.

We have developed a financial plan for the expanded school that will be fiscally sustainable (additional details below). We have also secured over \$650,000 in startup fundraising from four national and local partners (CSGF, NSVF, SPP, and Memphis Education Fund) to cover our R&D / planning and phase-in needs. We have commenced fundraising for our facility needs, which we have conservatively estimated at \$4 million, and have written or verbal commitments for 50-75% of the funds and strong leads in process for the remainder.

E. Projected financial security

The financial plan provided in our 2023 charter amendment anticipates a healthy and secure future.

The small addition of seats at our current grade levels (the equivalent of one classroom) will not have a material net effect on the budget. We will need an additional teacher and assistant to serve up to 24 students, as well as one-time expenditures for curriculum/furniture/materials for the class. These costs will be covered by the additional per pupil revenue for the students. The teacher training needed will be provided for de minimis additional cost through our in-house training center. We have analyzed current rates of teacher coaching, special education and intervention services and capacity on our team, and expect to be able to serve the added students as currently constituted.

The additional grade levels would entail both additional classroom level costs as well as expansion of support services, however our plan also shows how these will be afforded. Middle grade classes are expected to be staffed slightly differently than our current classrooms, the latter of which have a full time teacher and assistant for 20-24 students. Instead, middle grades will have a smaller class size (tentative target 16) with one teacher, and a small number of assistant teachers / paraprofessionals shared part-time across the team. The phasing-in of these positions is reflected in the FTE counts shown on the budget.

Additional support staff positions anticipated (with year of expansion to be added):

- Instructional support / teacher coaching (Year 1)
- Social-emotional / behavior support / “Attachment village” team (Year 2)
- Family engagement (Year 3)
- Academic intervention (Year 3 - to be done by incubation teachers in years 1-2)
- 2 special educators - one resource, one self-contained (Years 2 and 3)
- 2 enrichment teacher (shared PreK-8th) (Years 2 and 3)
- Custodian (phase in from part time in Years 1-3)
- Substitute (Year 3)

Employee benefits are budgeted every year at roughly 25% of salaries, to cover taxes, medical insurance, health reimbursement account and related benefits, and retirement.

For the combined amendment, miscellaneous other operating costs - such as books, uniforms, printing, furniture, technology, field trips, family engagement, marketing, telecom, student transportation - have been forecast in the budget using historical rates, validated through our years of effective financial management. Our estimated rates for these items are enumerated in the attached budget. Instructional materials/furniture for new middle grades classrooms are shown at an average of \$100,000 per year for the three years of phase-in; these are offset partly by remaining fundraising (discussed below) and the remainder through recurring funds. All of the above ongoing operating costs are affordable on recurring revenue.

The Tennessee Investment in Student Achievement (TISA) is providing a substantial increase (10-15% over BEP) recurring public revenue stream that is enabling us to provide the high level of special education and family services we have always provided (subsidized by fundraising) and to make them sustainable through recurring public revenues. TISA is estimated in the budget at an average of \$11,500 per student. Of course, exact TISA funding varies based on the student. Our detailed calculations are shown for reference (some of these, such as direct / outcomes funds, are still shown conservatively as we wait to update).

While TPCSC pools Title I, IDEA and related federal funds into a schoolwide pool, amounts are estimated in our budget for each, based on a weighted average of current and historical rates (given fluctuations in federal, state and district factors in the allocation of these funds and changes in district composition). IDEA in particular is estimated based on analysis of our large special ed population trends and the district’s new weighted allocation formula in line with TISA. As shown in the budget, Title I is estimated at \$1,275 and IDEA at \$422 per pupil, while Title II is at \$850 per teacher (all of these are more than FY24 preliminary estimates but

less than FY23 final amounts). Should these amounts vary, the budget would be adjusted accordingly, utilizing our healthy reserve as a short-term cushion while long-term expenses are recalibrated as needed.

Note that fee revenues in our budget are related to and offset the cost of specific initiatives, including our teacher training program, child care center, and specific costs such as uniforms and extended care (outside of our state-funded LEAPs program).

We are also now generating some interest income annually from our savings; these are estimated based on rates that will be adjusted annually in relation to market conditions.

There are two other areas of special note regarding expense and related fundraising.

First, a unique feature of our growth plan is that we envision staffing 1-2 teacher positions one year in advance of adding each grade level, starting this year and extending through the first two years. In the “incubation” year each of those teachers will spend part of their time supporting students in their current grade level work to build the kind of multi-year relationships we have always valued at Libertas, but also planning and refining the curriculum they will teach the following year. Outside of facility costs, this is our largest startup expense: \$67,000 per position (salary and benefits) times 1-2 per year times 3 years - which, combined with the incubation of the full-time instructional leader this year, totals to as much as \$470,000.

This startup personnel expense is already fully covered by \$650,000 in startup fundraising we have secured from a combination of four local and national funders. (Note however that these incubation positions are an area of potential economy in Years 1 and/or 2 if needed based on other expense or revenue factors.) The surplus startup funds would be available for the instructional materials / furniture startup expenses mentioned above and/or for facility costs.

The final major startup expense is the facility. As mentioned above, we are exploring at least three viable scenarios for Years 3 and beyond, while we already have a secure plan for Years 1-2. Given the uncertainty of the final plan, we have conservatively budgeted 8% of TISA per pupil revenue for each middle level student for occupancy costs. This would either serve as an inclusive rent payment to the building owner (which would be responsible for insurance and utilities), or as a placeholder for debt service and/or operating costs we may generate for owned space. We prefer and anticipate an ownership scenario, either at our site or our leading nearby option, and are developing a \$4 million budget for that project. At this point, only the first \$750,000 commitment toward the facility is included in our philanthropy budget, as the remainder may come in for beyond Year 2 of the expansion. However we have already identified 75% in combined gift pledges and subsidized loan funds from funders. The final 25% will be funded through a combination of cash equity and remaining fundraising.

In the out-years of our growth plan, once we have reached the scale of the proposed expansion, there is a modest goal of \$75,000 per year in fundraising. This represents an extremely reasonable assumption: it is less than 20% of the annual fundraising we have averaged over the last eight years.

F. Operational management

In the “organizational change” subsection above we outlined some updates to staffing and contractors to help ensure efficacy in this area as we grow.

G. Addressing any past academic, organizational, or financial deficits

In sections 1B and E above we discussed some challenges and lessons learned in our academics in the earlier years of our initial charter. However we are confident that the adjustments made - our Montessori-based, standards-aligned curriculum and formative assessment roadmap, and our Arete Residency, were the crucial steps needed to continuously improve performance and put us on the sustainable trajectory needed to justify expansion into middle grades. Other than these understandable challenges in the process of turning around a priority school, we have not experienced any other organizational or financial deficits as reflected in our consistent positive ratings from ASD and TPCSC. We look forward to a productive collaboration for years to come.