



Invictus Nashville Charter School

Amended Application for a Public Charter School

Opening in the 2024-2025 School Year

May 26, 2023

Respectfully submitted to Metro Nashville Public Schools on behalf of the Founding Board of Invictus Nashville Charter School:

Dr. Brenda Jones—ex officio, Proposed Executive Director

Dr. Allison McGuire—Board Chair

Neysa Taylor—Vice Chair

Charles Webb—Treasurer

Dawana Wade—Secretary

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For the reviewers,

In the amended application, there were several pages (pages 1-4) that discussed the changes and the corresponding page numbers for the MNPS review team based on the initial feedback. Since the Tennessee Public Charter Commission requested a clean copy of the amended application with no tracked changes, those pages have been removed and the page numbers have been updated. For tracked changes and the cover letter, please see our Amended Application that was submitted to Metro Nashville Public Schools

Thank you,
Invictus Nashville

GENERAL INFORMATION

Name of Proposed School..... **Invictus Nashville Charter School**
 Projected Year of School Opening: **2024—2025**
 Charter Authorizer for Proposed School..... **Metro Nashville Public Schools**
 Sponsor/Sponsoring Agency..... **Invictus Nashville Charter School, Inc.**
 The sponsor is a not-for-profit organization with 501(c)(3) status..... **Yes**
 Model or Focus of Proposed School:

A community co-design learning model with a Montessori Elementary and PBL Middle School with a focus on mentoring, expeditions, and community service for K–8 students.

City or Geographic Community for Proposed School: **.Hermitage/Donelson District 4 in Davidson County**
 Name of Primary Contact Person (this person should serve as the contact for follow-up, interviews, and notices regarding this application) **Dr. Brenda Jones**
 Mailing Address: **2729 Smith Springs Road**
 Primary Telephone: **(615) 438—0551**
 Email Address: **bjones@fellow.bes.org**

Names, Current Employment, and Roles of All People on School Design Team (add lines as needed):

FULL NAME	CURRENT EMPLOYER/JOB TITLE	POSITION WITH PROPOSED SCHOOL
Dr. Brenda Jones	Build Excel Sustain, Fellow	Proposed Executive Director
Dr. Allison McGuire	Entrepreneur	Proposed Board Chair
Neysa Taylor	Amazon, Senior Communications Manager	Proposed Vice Chair
Charles Webb	Florida Cancer Specialist, Corporate Development Team	Proposed Treasurer
Dawana Wade	Salama Urban Ministries, CEO	Proposed Secretary
John Little	Nashville Propel, Director of Community Outreach	Proposed Community Engagement Committee Lead
Penelope Pak-McMillen	Instruction Partners, Senior Director	Proposed Academic Committee Lead
Courtney Teasley	C. Teasley Law Firm, Attorney	Proposed Governance Committee Lead
Dominique Donette	Equity Strategist	Board Member

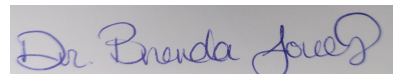
Does the proposed school intend to contract or partner with a charter management organization? **No**
 Does this applicant have charter school applications under consideration by any other authorizer?..... **No**
 Indicate Applicant Type: **New-Start Applicant (Category)**

ASSURANCES

As the authorized representative of the sponsor, I hereby certify that the information submitted in this application for a charter for Invictus Nashville Charter School is true to the best of my knowledge and belief, realizing that any misrepresentation could result in disqualification from the application process or revocation after award; and if awarded a charter, the school:

1. Will operate as a public, nonsectarian, non-religious public school, with control of instruction vested in the governing body of the school under the general supervision of the authorizer and in compliance with the charter agreement and the Tennessee Public Charter Schools Act;
2. Will operate as a public, nonsectarian, non-religious public school, with control of instruction vested in the governing body of the school under the general supervision of the authorizer and in compliance with the charter agreement and the Tennessee Public Charter Schools Act;
3. Will follow all federal, state, and local laws and regulations that pertain to the operation of a public school, unless waived according to T.C.A. § 49-13-111(p);
4. Will provide special education services for students as provided in Tennessee Code Annotated Title 49, Chapter 10, Part B of the Individuals with Disabilities Education Act; Title II of the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973;
5. Will adhere to all provisions of federal law relating to students who are limited English proficient, including Title VI of the Civil Rights Act of 1964 and the Equal Educational Opportunities Act of 1974, that are applicable to it;
6. Will follow all federal and state laws and constitutional provisions prohibiting discrimination on the basis of disability, race, creed, color, national origin, religion, ancestry, or need for special education services;
7. Will utilize this application as a contract with the authorizer, if no other agreement is signed, pursuant to Tennessee Attorney General Opinion No. 10-45;
8. Will comply with all provisions of the Tennessee Public Charter Schools Act, including, but not limited to employing individuals to teach who hold a license to teach in a public school in Tennessee;
 - a. complying with Open Meetings and Open Records laws (T.C.A. §§ 8-44-101 et seq.; 10-7-503, 504) (guidance is available from the Office of Open Records Counsel);
 - b. not charging 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;
 - c. following state financial (budgeting and audit) procedures and reporting requirements according to T.C.A. § 49-13-111, 120, and 127;
 - d. requiring any member of the governing body, employee, officer, or other authorized person who receives funds, has access to funds, or has authority to make expenditures from funds, to give a surety bond in the form prescribed by T.C.A. § 8-19-101; and
9. Will, at all times, maintain all necessary and appropriate insurance coverage.

Signature:.....



Printed Name of Authorized Representative:..... **Dr. Brenda Jones**

Title of Authorized Representative:..... **Lead Founder & Proposed Executive Director**

EXECUTIVE SUMMARY

Community at the Core

Invictus Nashville Charter School is a school designed with community at the core, and it is evident in our founding story, our design process, our mission and vision, our proposed model, and our planning process. Our journey begins with a founder who is a Nashville native and proud graduate of Metro Nashville Public Schools. The founder was locally educated at Belmont University, Middle Tennessee State University, and Trevecca Nazarene. As a first-generation high school graduate, she is dedicated to public education opportunities for all students in Nashville, Tennessee. Our design process included the creation of a diverse co-design team that included local students, educators, community leaders, and parents. This design team volunteered to support the founder centered on key wonderings: “What would a school specifically designed for Nashville have to include?” “What are the hopes and dreams for our children?” “How would a new school add value to the public education landscape here?” The summation of what we heard from community members, parents, grandparents, business owners, community organization leaders, elected officials, college students, teachers, and administrators live in this application. While we submit this innovative, clear, and detailed proposal as the Invictus Nashville team, we do so on behalf of the Nashville community.

Mission

In partnership with families, Invictus Nashville will prepare our K–8 students to become engaged members of society by helping them identify their unique path to personal and professional success. Through a diverse culture, personalized learning that fosters high academic achievement, and community service, Invictus Nashville graduates will be equipped with the necessary habits of success and a heart for service in their communities.

Vision

Invictus Nashville’s mission and vision are grounded in the belief that one size does not fit all students and families. We believe that Nashville’s families should have a variety of excellent schools to choose from and that there is currently a piece missing in the public education landscape in Davidson County—innovative models for character development and community involvement. We have carefully constructed a model that drives towards academic achievement for all students, empowers students to impact their communities, and continuously supports each child’s character development. Each of these priorities are responsive to community desire and demand, and they are supported by sound educational research. We propose Invictus Nashville to respond to immediate needs in the Donelson/Hermitage area and Davidson County at large.

It is with lived experience, understanding, commitment, and zest for this need that we propose Invictus Nashville Charter School. We believe that a school that implements a curriculum grounded in real-world application and student autonomy will empower students to impact their communities and prioritizes authentic character development will lead to a high-quality option for Nashville’s families and students, as well as foster innovation in supporting social-emotional learning, character development, and community involvement in Davidson County. Our vision and design are consistently informed by our core beliefs in what it will take to make our mission a reality.

- 1. Students and their families should be active participants in decisions about their education and future aspirations.** Academic and character development, supported by social emotional learning, has demonstrated learning benefits for students. We propose a model that provides weekly one-to-one mentoring for students. These mentors will also provide direct support to parents and ensure that they are informed of their student progress. We will bring all stakeholders in a child’s

development to the planning table when working on character development to ensure both consistency in this work and cultural congruence.

- 2. Diverse and applicable experiences better prepare students for the real world. This belief grounds all that we do.** It influences our curriculum that encourages our students to explore and discover, to collaborate with classmates, and to take ownership of their education. The embedded expedition week encourages self-directed learning that promotes self-confidence, independent thought and action, and critical thinking, while fostering social-emotional and intellectual growth.
- 3. There are habits needed to thrive upon graduation that apply in both college and careers.** There are foundational skills that students need to develop higher-order skills. These foundational skills develop through a pathway that integrates cognitive, social, and emotional skills. The Habits of Success framework was designed with this understanding. The framework acknowledges that children do not always get the same start in life and do not all follow an identical path. It helps provide guidance to educators on how to support students who have experienced trauma and other adverse circumstances.
- 4. Every student should know and believe that the world is bigger than their neighborhood, state, or country.** We believe deeply that at this level, the teaching of peace, social justice, and global citizenship is based on fostering respect for all people and living things, and helping children learn the tools for peaceful conflict resolution. The combination of our curriculum and a focus on community service will ensure character development happens best in the community. We believe our school will make young people invested in the Nashville community and will lead to dynamic, long-term growth of our city.

Population, Challenges, and Considerations

When selecting our community, we considered the unique challenges different clusters face within Metro Nashville Public Schools and how our design could fill that specific challenge. We also considered communities that would likely lead to a student population that could fit the diverse-by-design model that Invictus would be proposing. As an open enrollment, public charter school, Invictus Nashville will accept any new student who resides in Davidson County (capacity permitting). We also believe deeply in schools serving the community they are geographically located in, and therefore, we propose a school that is in and primarily serves the neighborhoods of Donelson and Hermitage—drawn with clearer lines, we propose to serve students who are currently zoned for schools in District 4. This district gives us the greatest likelihood of serving students who can meet our demographic goals and our hope to serve students who are historically leaving this district to find suitable middle and high school options.

Enrollment data of the zone schools in District 4 demonstrate a natural demographic for a diverse by design model as well the challenge of having significant attrition from elementary to high school. The demographics of the schools where students in the target zone have an average of 34% White students, 39% Black, 25% Hispanic/Latino, and 2% Other. In addition, these schools have an average of serving about 36% of Economically Disadvantaged students, 18% English Language Learners, and 14% Students with Disabilities (SwDs). Further analysis of District 4's enrollment shows a total of 6,163 students enrolled in elementary and middle schools in the school year. There are 2,101 students enrolled in the only high school for the zoned area.¹ This shows a decline from elementary to high school of about 4,062 students which indicates that students are leaving this area for other middle and high school options. Metro Nashville Public School (MNPS) students in elementary and middle school trail behind the State of Tennessee on End of Year assessments. Please see **Table 1** for the results.

¹ Open data portal. Metro Nashville Public Schools. (n.d.). Retrieved January 14, 2023, from <https://www.mnps.org/about/communications/opendata>

Table 1
MNPS versus State End-of-Year Assessments

CATEGORY	MNPS (PROFICIENT/EXCEEDING)	STATE OF TENNESSEE (PROFICIENT/EXCEEDING)
Elementary English	28%	38%
Elementary Math	24%	37%
Middle School English	23%	32%
Middle School Math	21%	33%

Not surprisingly, these gaps compound at the high school level. The high school in our target zone is on the targeted support and improvement list for 2022. The average ACT score for the zoned high school has not been above 18 in the last three years. The average ACT score for MNPS is only 19.2 These gaps negatively impact the chances that students have to excel in post-secondary opportunities of their choice.

We have thoughtfully selected research-based, innovative instructional features for Invictus Nashville that will address these gaps: weekly one-to-one mentoring, elementary Montessori curriculum, middle school project-based learning, community service, and expeditionary learning weeks. We believe that these five features, supported by an individualized approach to each student, will allow us to serve the targeted community.

Founding Team’s Capacity

The proposed Executive Director Dr. Brenda Jones is a Build. Excel. Sustain. (“BES”) Fellow with experience as a school leader and entrepreneur. Dr. Jones was raised in Nashville, Tennessee and is a proud graduate of Metro Nashville Public Schools. Dr. Jones grew up with a deep appreciation for and understanding of the importance of education and its ability to change communities as a first-generation high school graduate.

After graduating, Dr. Jones focused her career on middle school education, and she has complemented her career experience with receiving a Masters in Curriculum and Instruction at Middle Tennessee State University and a Doctorate Degree in Educational Leadership and Professional Practice at Trevecca Nazarene University. Dr. Jones has strengthened her capacity as a school founder by spending the past 4 years coaching school leaders across the county in instructional change management. In addition, she has observed several high performing charter schools, developed expertise in school leadership, finance, design, and management through 1200+ hours of BES training. Dr. Jones has completed three residencies across the country with one more coming in the Spring to continue her development. Dr. Jones is joined in submitting this application by a high-capacity team that is deeply committed to the Nashville community and overseeing the successful launch, growth, and sustainability of Invictus Nashville. The Founding Board of Directors is uniquely equipped to provide support and capacity to the proposed Executive Director through their demonstrated experience and expertise in K–12 education, youth development, finance and fiscal oversight, fund development, community engagement, marketing, and communications, as well as executive leadership experience. The Board deeply understands their oversight responsibility and their critical role in delivering on our promises to the community. Our team’s breadth of experience positions us to design, plan, launch, grow, and sustain a high performing charter school that serves the students of Metro Nashville.

2 Data Downloads & Requests. Tennessee State Government—TN.gov. (n.d.). Retrieved January 14, 2023, from <https://www.tn.gov/education/data/data-downloads.html>

SECTION 1. ACADEMIC PLAN DESIGN AND CAPACITY

1.1. School Mission and Vision

In this section:

- Provide a mission statement for the proposed charter school. Note: the mission statement should indicate in measurable terms what the school intends to do, for whom, and to what degree. The school's mission statement provides the foundation for the entire application.
- Describe the vision of the proposed school and how the vision will help achieve the school's mission.
- Describe how the mission and vision of this school will meet the prescribed purposes for charter schools found in T.C.A. § 49-13-102(a).
- Describe how the mission and vision of the proposed school address any priorities set by the authorizer.
- Describe what the proposed school will look like when it is achieving its mission.
- Describe the innovative or unique features of the proposed school or education model. How do these unique features align with the mission and vision of the school? How will these unique features foster student achievement and success?

1.1.A. Mission

Invictus Nashville will prepare our K–8 students to become engaged members of society by helping them identify their unique path to personal and professional success. Through a diverse culture, personalized learning that fosters high academic achievement, and community service, Invictus Nashville graduates will be equipped with the necessary habits of success and a heart for service in their communities.

1.1.B. Vision & Goals

Invictus Nashville is a purposefully designed charter school with input from the community on the school design. The mission of Invictus Nashville is specifically tailored to help students find their unique path to success with strong ties to the community. The mission of Invictus Nashville is the vehicle that drives the vision for the proposed K–8 school that is in, of, and for the community of Nashville.

We envision a school that transforms the community that it is in—a school whose success is measured by the impact its students, families, teachers, and leaders have on the larger health, prosperity, and joy of the community it serves. The purpose of the school will be to cultivate college and career ready young adults with a diverse worldview that will become leaders in their communities. Students that attend Invictus Nashville will deeply understand why their learning matters, how it can impact their community, and see the opportunities for success in their community.

The design of Invictus Nashville is driven by four core beliefs that are grounded both in research, educational best practices, and conversations with stakeholders in Davidson County. We have conducted several

stakeholder interviews, received over 200 family input surveys, and petitions of support. We believe our design is representative of qualitatively proven best practices and the design elements of the targeted community. These core beliefs are the following:

1. Students and their families should be active participants in decisions about their education and future aspirations.
2. Diverse and applicable experiences better prepare students for the real world.
3. There are habits needed to thrive upon graduation that apply in both college and careers.
4. Every student should know and believe that the world is bigger than their neighborhood, state, or country.

Below we briefly define each of our core beliefs. These core beliefs translate into five key design elements, which are described in much more detail, including research supporting their effectiveness, in *Section Error! Reference source not found.*

Core Belief #1

Students and their families should be active participants in decisions about their education and future aspirations.

There are several researchers who recognize the important role that strong positive bonds between homes and schools play in the development and education of children.³ The theories put forward have been supported, and reaffirmed, by numerous studies that have shown that good cooperation between schools, homes and the communities can lead to academic achievement for students, as well as to reforms in education.⁴ Research has also shown that most successful students' have strong academic support from their involved parents.⁵ Joyce Epstein is a leading researcher of parental involvement and the founder and director of the National Network of Partnership Schools at Johns Hopkins University. She determined that there are several reasons for developing and establishing a partnership between school, family, and community. The main reason for such a partnership is to aid students in succeeding at school. There are additional reasons for establishing this partnership that include the following: improving school climate and school programs, developing parental skills and leadership, assisting families in connecting with others in the school and the community, and assisting teachers with their work.⁶ The conclusion from several research studies is that parents playing an active role in their children's education and keeping a strong and positive relationship with schools is of the utmost importance.

There are barriers to parental involvement that must be taken into consideration when working to establish a positive relationship between the school and families. Research has identified the four barriers as: time poverty, lack of access, lack of financial resources, and lack of awareness.⁷ These barriers increase the likelihood that families will not contact the school or be as involved. To reduce barriers preventing parental involvement, the climate of the schools need to be welcoming. This climate is one where the school staff is respectful and responsive to parents.⁸ A survey of parents in four school systems concluded that parents want to be treated with respect and do not want a professional client

3 Đurišić, M., & Bunijevac, M. (2017). Parental involvement as an important factor for successful education. *Center for Educational Policy Studies Journal*, 7(3), 137–153. <https://doi.org/10.26529/cepsj.291>

4 Richardson, S. A. (2009). Principal's perceptions of parental involvement in the "big 8" urban districts of Ohio. *Research in the Schools*, 16(1), 1–12.

5 Sheldon, S. B. (2009). In *School, family, and community partnerships: Your handbook for action*. (3rd ed.). USA: Corwin Press.

6 Epstein, J.L. (2009). In *School, family, and community partnerships: Your handbook for action* (3rd ed.). USA: Corwin Press.

7 Williams, T. T., & Sanchez, B. (2011). Identifying and decreasing barriers to parent involvement for inner-city parents. *Youth & Society*, 45(1), 54–74.

8 Rutherford, R. B., & Edgar, E. (1999). *Teachers and parents: A guide to interaction and cooperation*. Boston: Allyn and Bacon, Inc.

relationship but to be seen as partners.⁹ Therefore, parent involvement must be part of a broader strategy than just site-based leadership. This strategy should be accompanied with complementary support learning and development as a systematic effort supported by joint action of all stakeholders.¹⁰ Furthermore, the involvement of parents should be viewed as a continuous process that has its evolutionary stages through childhood and adolescence and is especially important in the periods of the transition of children from one to another level of schooling.¹¹

Considering the research findings, as well as discussions with other experts, there is no doubt that effective schools with a positive school climate have made a real effort in reaching out to their students' families which has resulted in bringing about good cooperation.¹² These studies show us at Invictus Nashville that an intentional component of our model must focus on the connection between students, families, schools, and the community. Invictus Nashville will create an environment where a strong and positive relationship among students, parents, teachers, and the community has been established. So, how will we ensure that there is a positive connection between our school, parents, and community at Invictus Nashville? We will balance three requirements at our site—weekly one-to-one mentoring, community service, and expedition weeks with established partners (more detail on this model in **Section 1.1.F**).

Core Belief #2

Diverse and applicable experiences better prepare students for the real world.

Cultural diversity in the classroom is on the rise. In 2014, U.S. public schools hit a minority majority milestone with Latino, African-American, and Asian students having surpassed the number of white students.¹³ In 2044, the U.S. Census predicts that over half of the nation's population will be people of color, so this trend will likely continue.¹⁴ As diversity increases, it is not only related to race and ethnicity; it can include students of different religions, economic status, sexual orientation, gender identity, and language background. With the rise of globalization, it's more important to be able to work with people from different cultures and social groups. If students are exposed to diversity and learn cultural awareness in the classroom, it sets them up to flourish outside of the four walls of the classroom.

Diverse experiences will allow proper exposure for students at Invictus Nashville. Early exposure is critical to ensure that students can make informed decisions about future career pathways.¹⁵ Mitchell Institute reports collaborating with industry and the community is vital to better prepare children and young people for future work and life.¹⁶ Exposure to the world of work provides opportunities for students to build connections with professionals outside their usual family networks, and to learn by “doing” in real world contexts. Varied opportunities to engage with the world of work, through career talks, mentoring, and excursions to job sites can be valuable from primary school through to secondary school, particularly

9 Davies, D. (1996). Partnerships for student success. *New Schools, New Communities*, 12(3), 13–21.

10 Herrell, P. O. (2011). Parental Involvement: Parent Perceptions and Teacher Perceptions.

11 Bouffard, S. & Weiss, H. (2008). Thinking big: A new framework for family involvement policy, practice, and research. *The Evaluation Exchange*, 14(1–2), 2–5.

12 Sanders, M. G. & Sheldon, S. B. (2009). *Principals matter: A guide to school, family, and community partnerships*. Corwin: A SAGE Company.

13 Krogstad, J. M., & Fry, R. (2020, September 4). Dept. of Ed. projects public schools will be 'majority-minority' this fall. Pew Research Center. Retrieved August 16, 2022, from <https://www.pewresearch.org/fact-tank/2014/08/18/u-s-public-schools-expected-to-be-majority-minority-starting-this-fall/>.

14 Colby, S. L., & Ortman, J. M. (2015). *Projections of the Size and Composition of the U.S. Population: 2014 to 2060*. U.S. Census Bureau.

15 Gore, J., Holmes, K., Smith, M. et al. Socioeconomic status and the career aspirations of Australian school students: Testing enduring assumptions. *Aust. Educ. Res.* 42, 155–177 (2015). <https://doi.org/10.1007/s13384-015-0172-5>.

16 Torii, K. (2018). (rep.). Connecting the worlds of learning and work Prioritising school-industry partnerships in Australia's education system. <https://www.vu.edu.au/sites/default/files/connecting-the-worlds-of-learning-and-work-mitchell-institute.pdf>.

for students at risk of disengagement.¹⁷ Our robust community engagement throughout the last year revealed the importance of students understanding the many options available to them after high school, rather than a single track towards a successful life. We believe that this understanding begins as early as elementary school. We believe in this exposure, and we believe in supporting students in understanding that excelling in post-secondary opportunities of their choice is a deeply personal process.

Invictus Nashville will provide a naturally diverse environment based on the location that we plan to serve in the Donelson/Hermitage area (more detail on this in **Section 1.2**). We will also balance diverse and applicable experiences through our curriculum, community service, and expedition weeks with established partners (more detail on this model in **Section 1.1.F**). We believe that our key design elements and strategic community partnerships accomplish two purposes: increased academic and skill outcomes and increased exposure to post-secondary opportunities in their communities. As students connect with community organizations and businesses through community service and expeditions, they will make connections with opportunities available to them in their community. We believe in an academic model that prepares students to choose college as a post-secondary option if that is the option that is best for them and their family. We also believe in an academic model that exposes students to opportunities for success in the community that do not necessarily require post-secondary education.

Core Belief #3

There are habits needed to thrive upon graduation that apply in both college and careers.

Successful engagement in the classroom and in life relies on a set of cognitive and social emotional skills and mindsets which are not represented in academic standards. Research has shown that when educators neither prioritize these skills and mindsets nor integrate them with academic development, students are left without tools for engagement or language for learning. This leads to students becoming dependent on adult-driven routines rather than on their own skills or motivation.¹⁸ Habits of Success are the social and emotional skills that enable students to be successful at both academic and non-academic pursuits. The field of social-emotional learning (SEL) is awash in terminology to describe factors required for successful learning, outside of traditional academic skills and Content Knowledge.¹⁸

The 16 skills that comprise the Habits of Success were chosen based on three criteria:

1. They align to the development of the child as a “learner” in an educational setting.
2. They are measurable skills, behaviors, or mindsets that students can develop over time; and
3. There is a strong research base demonstrating the impact of the skill, behavior, or mindset on college and career success.¹⁸

Each skill, which we define as a Habit of Success, draws on its own deep literature and evidence base. For example, the skills considered to be part of healthy development and school readiness are drawn from the fields of neuroscience and child development and include having strong bonds with adults, emotional security, and the skills to cope and manage stress.¹⁴ Similarly, the student-held mindsets are derived from the work of Camille Farrington and teammates at the University of Chicago Consortium on Chicago

¹⁷ Kate Torii Policy Analyst. (2022, August 4). Why School Kids Need more exposure to the world of work. The Conversation. Retrieved August 16, 2022, from <https://theconversation.com/why-school-kids-need-more-exposure-to-the-world-of-work-100590>.

¹⁸ Stafford-Brizard, K. B. (2016). Building Blocks for Learning: A Framework for Comprehensive Student Development. Turnaround for Children. Retrieved from: <http://turnaroundusa.org/wp-content/uploads/2016/03/Turnaround-for-Children-Building-Blocks-forLearningx-2.pdf>.

Schools Research. They have demonstrated the relationship between highly developed habits of success and high levels of student achievement.¹⁹

Further research on the habits indicates that students need to develop skills, dispositions, mindsets, and behaviors that: are malleable, academically important, recognize the social nature of learning and align with important milestones of adolescent development.²⁰ In addition, the assessment of Habits of Success should be used to support students' growth and development and for program improvement purposes. Assessment should not be used for the purposes of grading, evaluation, or promotion.²¹ In order for the development of Habits of Success to be successful, it must be modeled within the school environment: in adult interactions; within school routines, celebrations, policies, and procedures; and as part of ongoing professional development for educators.²²

After a careful review of existing frameworks, Invictus Nashville has adopted the Building Blocks for Learning framework developed by Dr. Brooke Stafford-Brizard on behalf of Turnaround for Children.¹⁴ The Building Blocks framework integrates decades of the most promising research on social-emotional learning in an aligned and comprehensive manner. Habits of Success include the development of skills in five categories:

1. Healthy Development (Attachment, Stress Management, Self-Regulation);
2. School Readiness (Self-Awareness, Social Awareness/Relationship Skills, Executive Functions);
3. Mindsets for Self and School (Growth Mindset, Self-Efficacy, Sense of Belonging, Relevance of School);
4. Perseverance (Resilience, Agency, Academic Tenacity); and
5. Independence and Sustainability (Self-Direction, Curiosity, Civic Identity).²³

19 Farrington, C.A. et al. (2012). Teaching Adolescents to Become Learners: The Role of Noncognitive Factors in Academic Performance: Critical Literature Review. The University of Chicago Consortium on School Research. Retrieved from: <https://consortium.uchicago.edu/sites/default/files/publications/Noncognitive%20Report.pdf>

20 Schwartz, D., Tsang, J. M., & Blair, K. P. (2016). The ABCs of How We Learn: 26 Scientifically Proven Approaches, How They Work and When to Use Them. New York: W. W. Norton & Company.

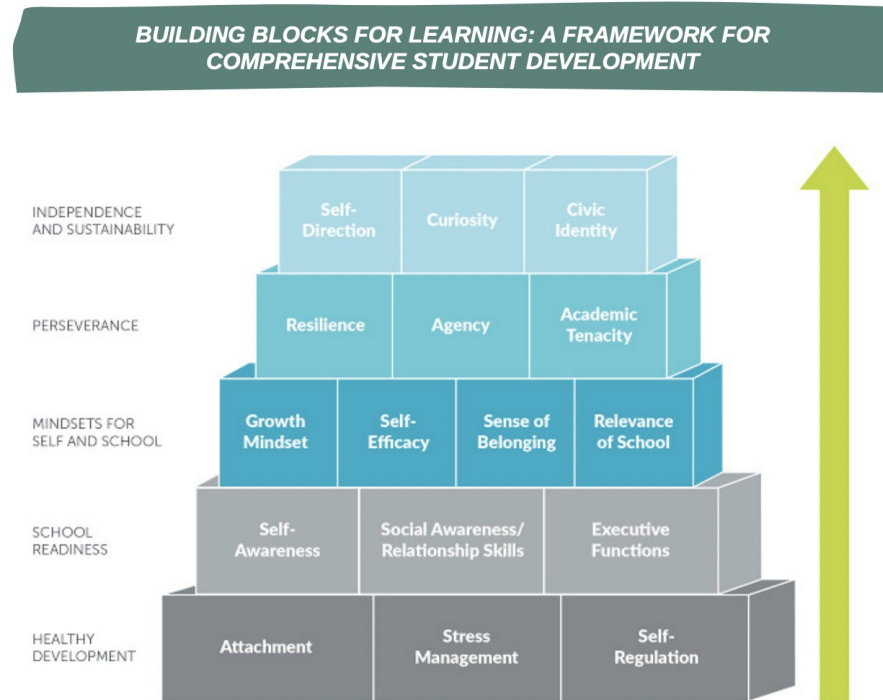
21 Duckworth, A. & Yeager, D. L. (2015). Measurement Matters: Assessing Personal Qualities Other Than Cognitive Ability for Educational purposes, *Educational Researcher*, 44(4): 237–251.

22 Berger, R., Rugen, L., & Woodfin, L. (2014). *Leaders of Their Own Learning: Transforming Schools Through Student-Engaged Assessment*. San Francisco, CA: John Wiley & Sons

23 Jones, B. N. (2018). The Summit Learning Platform and its effects on middle school students' achievement in Mathematics (dissertation). ProQuest, Nashville, TN.

Figure 1

Habits of Success



Stafford-Brizard, K. B. (2016). Turnaround for Children.

The development of the Habits of Success for students happens within the communal, relational context of a classroom. We believe that our one-to-one mentoring within small mentoring house systems will accomplish this task at Invictus Nashville. While other frameworks focus more heavily on the interaction between a student and his or her individual academic trajectory, our framework situates learning within the social context of a classroom through a set of key relationships a student develops with teachers, peers, and other adults.¹⁴ There are foundational skills that students need in order to develop higher-order skills.¹⁸ These foundational skills develop through a pathway that integrates cognitive, social, and emotional skills. The Habits of Success framework was designed with this understanding. The framework acknowledges that children do not always get the same start in life and do not all follow an identical path. It helps provide guidance to educators on how to support students who have experienced trauma and other adverse circumstances. Our goal is that by the time students leave our school, they can demonstrate the skills of independence (without scaffolds) and transfer (in multiple contexts) of Self-Direction, Curiosity, and Civic Identity—the top row of the Building Blocks for Learning framework. We will achieve this development through our—weekly one-to-one mentoring and selected curriculum (more detail on this model in **Section 1.1.F**).

Core Belief #4

Every student should know and believe that the world is bigger than their neighborhood, state, or country.

Global competence is a multidimensional capacity. Globally competent individuals can examine local, global, and intercultural issues, understand, and appreciate different perspectives and worldviews, interact successfully and respectfully with others, and take responsible action toward sustainability and collective well-being.²⁴ Students will spend more time in school during their K–12 life than any other place. Naturally, this means that schools play a critical role in helping young people to develop global competence. Schools have the opportunity to provide our young people ways to critically examine global developments. To develop competence, the experience that schools offer should be both significant to the world at large and to their own lives.²⁴ This diverse exposure can teach students how to critically, effectively and to use digital information and social media platforms responsibly. Schools can encourage intercultural sensitivity and respect by allowing students to engage in experiences that foster an appreciation for diverse peoples, languages, and cultures.²⁵ Schools are also uniquely positioned to enhance young people’s ability to understand their place in the community, the world, and improve their ability to make judgments and act. Invictus Nashville will support evidence-based decisions on how to improve curricula, teaching, assessments, and schools responses to cultural diversity in order to prepare young people to become global citizens²⁶ (more detail on this model in Section 2.5).

Education for global competence builds on the ideas of different models of global education, such as intercultural education, global citizenship education and education for democratic citizenship.²⁷ Despite differences in their focus and scope, these models share a common goal. The goal is to promote students’ understanding of the world and empower them to express their views and participate in society. Invictus Nashville has chosen to adopt the model developed by PISA and embed unique opportunities in the curriculum for students to expand on their current understanding of the world. PISA contributes to the existing models by proposing a new perspective on the definition and assessment of global competence.²⁸

PISA approaches global competence as a multifaceted cognitive, socio-emotional and civic learning goal.²⁹ Global competence is defined by PISA as the capacity to examine local, global and intercultural issues, to understand and appreciate the perspectives and worldviews of others, to engage in open, appropriate and effective interactions with people from different cultures, and to act for collective well-being and sustainable development³⁰ This definition outlines four target dimensions of global competence that people need to apply successfully in their everyday life:

24 Cuccurullo, D. & Cinganotto, L. (2020). Fostering Cultural Awareness for a Global Competence. In M. Gómez-Parra & C. Huertas Abril (Eds.), *Handbook of Research on Bilingual and Intercultural Education* (pp. 125-158). IGI Global. <https://doi.org/10.4018/978-1-7998-2588-3.ch006>

25 Hanvey, R. G. (1975), *An Attainable Global Perspective*, Center for War/Peace Studies, New York

26 Costa, A. L. and B. Kallick (2013), *Dispositions: Reframing Teaching and Learning*, Corwin Press, Thousand Oaks, CA.

27 Council of Europe (2015), *TASKs for democracy; 60 activities to learn and assess Transversal attitudes, skills, and knowledge*, Council of Europe, Strasbourg.

28 Laura C. Engel, David Rutkowski & Greg Thompson (2019) *Toward an international measure of global competence? A critical look at the PISA 2018 framework*, *Globalisation, Societies and Education*, 17:2, 117-131, DOI: 10.1080/14767724.2019.1642183

29 Boix Mansilla, V. and A. Jackson (2011), *Educating for Global Competence: Preparing Our Youth to Engage the World*, Asia Society and Council of Chief State School Officers.

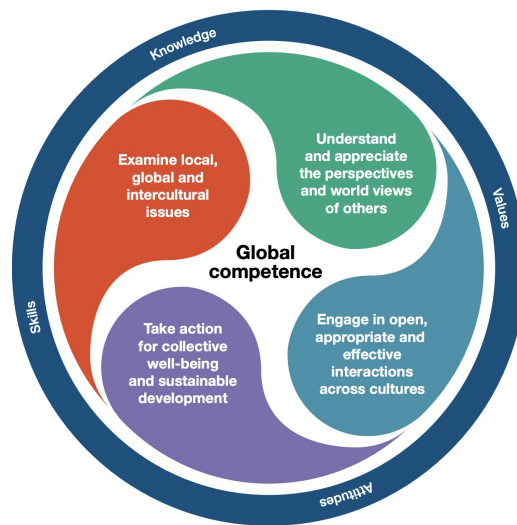
30 Schleicher, A. et al. (2018.). *Preparing our youth for an inclusive and sustainable world—OECD*. <https://www.oecd.org/pisa/innovation/global-competence/>.

Retrieved August 19, 2022, from <https://www.oecd.org/pisa/aboutpisa/global-competency-for-an-inclusive-world.pdf>

1. The capacity to examine issues and situations of local, global and cultural significance (e.g., poverty, economic interdependence, migration, inequality, environmental risks, conflicts, cultural differences and stereotypes);
2. The capacity to understand and appreciate different perspectives and worldviews; and
3. The ability to establish positive interactions with people of different national, ethnic, religious, social, or cultural backgrounds or gender; and
4. the capacity and disposition to take constructive action toward sustainable development and collective well-being.²⁵

Figure 2

PISA's Global Competence Approach



The research is conclusive—schools that respond to growing economic interdependence, cultural divides, new digital opportunities and calls for sustainability will have a significant impact on the well-being of all members of the communities they serve.³¹ Achieving global competence through education will require significant changes in the classroom: changes concerning what students learn about the world and other cultures, the opportunities they have to practice what they learn, and how teachers support this learning by working with diverse students²⁶ (more detail on this model in **Section 2.5**). At Invictus Nashville, we plan to create learning environments that put young people in the position to understand the world beyond their immediate environment. In addition, we will intentionally provide opportunities for students to interact with others with respect for their rights and dignity and act towards building sustainable and thriving communities. We will achieve this development through balancing three of our design features—our curriculum, community service and expedition weeks. (more detail on this model in **Section 1.1.F**).

³¹ Gay, G. (2015), "Teaching to and through cultural diversity", *Curriculum Inquiry*, Vol. 43/1, pp. 48-70.

1.1.C. Prescribed Purpose

Invictus Nashville Charter School is intentionally designed to address the six purposes for charter schools laid out in T.C.A. § 49-13-102:

1. **Improve learning for all students and close the achievement gap between high and low students.** Invictus Nashville will improve learning for all students and close the achievement gap between high and low performing students with quality research-supported curriculum and instructional methods. The uninterrupted work cycles based on the Montessori approach for elementary students have demonstrated success closing achievement gaps for all learners, specifically low-performing student groups. Improved learning and closing of achievement gaps will also be achieved by providing differentiated instruction through our Project Based Learning approach as students transition to middle school. We will analyze academic data to appropriately provide interventions and enrichment to ensure that all students meet learning targets.
2. **Provide options for parents to meet educational needs of students.** Two key elements of our academic program, our uninterrupted work cycles based on the Montessori method model and our Project Based Learning Approach, will provide new and needed options for parents that will better meet the educational needs of students in our proposed community of MNPS. Our Montessori approach is a welcomed curriculum in the target community but there has been a call for better transitional support as students leave the program. Our approach includes a smooth transition from Montessori to a more transitional approach with our project-based learning methods in middle school. Project Based Learning instructional methods are suited to differentiating content, processes, and products to ensure that all students, including ELs, students with special needs, and gifted students reach high levels of achievement in all content areas.
3. **Encourage the use of different and innovative teaching methods and provide greater decision-making authority to schools and teachers in exchange for greater responsibility for student performance.** Our innovative model provides a valuable option for families. Currently in MNPS there is only two K–4 school option that offers a Montessori education (Stanford Montessori Elementary and Hull Jackson), and demand far surpasses available seats at the school, leading families to seek private options which are more abundant in Nashville.

In addition, our PBL model is a welcome innovative option for students, families, and educators who are weary of the narrowed curriculum that has resulted from an increased emphasis on standardized tests. It will also provide an option for parents who would like a transition from Montessori back into a more traditional school setting. We maintain that academic achievement as demonstrated by standardized tests must not come at the expense of, and in fact benefits from, a balanced and purposeful curriculum. At Invictus Nashville development of rigorous academic standards, 21st-century skills, and social emotional competencies will occur through purposeful, meaningful projects that empower students to learn deeply about themselves, their communities, and their planet. Multifaceted assessments will demonstrate the success of this innovative model.

Our commitment to community service and expeditionary learning weeks will also be unique at Invictus Nashville. Our model will challenge our students to become global citizens through service and exposure learning through community partnerships. This challenges students to research and reflect on why the need for service exists across their community in the first place. We also propose an innovative approach to character education and social-emotional learning by involving a child’s village, the child themselves, and weekly mentoring in determining the Habits of Success to focus on for their development. Our vision is to be the first free, public school in Davidson County that offers this programming in the schedule and it is part of our mission and vision to lead the way in using this approach to ensure that all students can be receive the right academic supports at the right time and to be successful, self-actualized versions of themselves, More details on our Innovative and Unique Features can be found in **Section 1.1.F**.

1. Measure performance of pupils and faculty and ensure that children have the opportunity to reach proficiency on state academic assessments. We accept greater measures of accountability to gain and retain high levels of autonomy over our model. In *Section 1.4* we lay out the rigorous academic outcomes standards that we will hold ourselves to meet. In *Section 1.7* we lay out our robust assessment portfolio to hold ourselves accountable within and throughout school years. Invictus Nashville will measure performance of pupils and ensure that children have the opportunity to reach proficiency on end-of-course state academic assessments through continuous data analysis of intentionally selected and carefully implemented formative and summative assessments including reading assessments, writing tasks, student growth portfolios, NWEA MAP assessments, and practice TNReady assessments. Invictus Nashville will measure performance of faculty and leadership using Tennessee’s TEAM evaluation framework.,
2. **Create new professional opportunities for teachers.** Invictus Nashville will create professional opportunities for teachers to work in a blended learning environment focused on the elementary Montessori approach that supports a smooth transition for students back into a more traditional setting for middle school. The PBL teaching approach offers a unique professional opportunity for teachers who are inspired by the potential and purposeful challenge of this teaching method. In addition, we will offer a new professional opportunity for educators to build a professional community by focusing on our prioritized seven habits: sense of belonging, agency, executive functioning, growth mindset, relationship skills, and self-awareness. A focus on individualized professional learning paths will provide an interesting and essential professional opportunity for teachers.

Teachers will have professional growth opportunities by selecting a pathway. These teachers will have a minimum of three years of teaching experience. In addition, there will be school leader pathways for teachers who are identified by Invictus Nashville leadership or self-identify their professional goal to become a school-level leader. These opportunities are described in more detail in **Table 63** and **Table 64**. They include differentiated teaching assignments, extended contracts, summer fellowships, and Instructional Leadership opportunities. We believe deeply in the ongoing development of teachers, and we believe in creating a culture where teachers are dedicated to honing their craft in service of greater outcomes and richer experiences for children. We will offer robust professional development for 10 days prior to the launch of each school year. We will also offer 20 hours of professional development every 7th week during our expedition weeks with students. This time will serve as critical moments of reflection and planning. This equates to 21.5 full days of professional development and 2 additional hours of professional development each week which is over 300 PD hours across the school year.

Our teachers will also receive ongoing development throughout the school year through daily live coaching and weekly feedback cycles from their coaches to help them set, assess, and reflect on development goals. A more comprehensive explanation of our approach to Professional Development can be found in **Section 2.5**. Our curricular vision will expose teachers to a development opportunity that is not offered in many places in the country. Our mission and vision are centered on holistic development of children, and therefore, our teachers will have the opportunity to develop as educators that can develop, maintain, and sustain environments that accomplish that.

1. **Afford parents substantial meaningful opportunities to participate in the education of their children.** Families are key learning partners and will enjoy substantial meaningful opportunities to participate in the education of their children at Invictus Nashville. Our framework for creating and maintaining a community of engagement for parents is built around the norms of care and respect, trust, shared vision, authentic membership, and collective work. Our emphasis on Global Competence will be strengthened by authentic engagement with families and diverse community organizations aligned with our mission and vision. We have outlined our plan to engage families in our mentoring framework and our belief that families are paramount partners for the success of a

child’s education extends to all parts of their experience at our school—academic programming, community service, character development, extracurriculars, school policy design and review.

Families have been integral to our design throughout our process, as evidenced by 275 community conversations during our design phase, with over 120 of those conversations being with families in District 4. We also plan to continue engaging parents during our planning year, which will be seen in multiple sections of our application. We are excited to share more details about our plans to engage families at Invictus Nashville in **Section 1.12**. We begin our work knowing that this partnership is vital to our success and to the holistic development of students.

1.1.D. How the School Mission and Vision Address Priorities Set by Authorizer

The mission and vision of Invictus Nashville directly addresses five priorities outlined by MNPS for new charter school applications:

- 1. Advance academic achievement for students currently enrolled in schools that underperform.** The proposed enrollment zone for Invictus Nashville will be fully detailed in **Section 1.2**. For the purposes of this indicator, we note that the ideal location for the school is in District 4. The academic performance of the elementary and middle schools in Invictus Nashville’s target zone trails behind the performance of the district and the state. The district accountability report shows that 3 out of the 5-target zone middle schools have been or currently are on the targeted support and improvement list accompanied by the one charter middle school in the area.

Table 2 shows proficiency scores for the schools Math and ELA on the TNReady assessment for elementary and middle schools in District 4. Achievement score is assessed based on the percent of students who met or exceeded grade-level expectations (i.e., success rate) on state math and ELA assessments. At Invictus Nashville, we know that growth is equally important to overall school success.

Table 2 includes growth scores for our target area as well. Growth is measured using the Tennessee Value-Added Assessment System (TVAAS). Children do not start at the same place with their learning, but every student should learn and grow throughout the school year. The Growth indicator looks closely at the progress students are making within a school compared to the average progress of all students across the state. These are on a scale of 0–4. There is variation in achievement across schools in this area, but overall schools in this area demonstrate low performance and the majority underperform district average proficiency and growth rates.

- 2. Add to the number of schools with student enrollment diversity in Nashville.** As a diverse-by-design model, the cluster naturally provides diversity based on the enrollment population. One of our initiatives is to keep families in the target area for middle school and beyond. Our program promotes balanced populations with equal ethnic/racial representation of the student body represented by each group in an effort to promote global competency. Socioeconomic and linguistic diversity will be achieved through strategic location of the school and targeted recruitment with target enrollment goals that are reflective of the diversity of schools in the Donelson/Hermitage area as shown in **Table 3**.
- 3. Improve academic achievement in literacy.** Academic achievement in literacy in English across the domains of listening, speaking, reading, and writing is central to the Montessori model Invictus Nashville. Research-based core instructional practices will ensure high levels of literacy achievement for students. A study conducted in public Montessori schools in Hartford, CT reported language arts gains for Montessori children. The results were noticeably impactful for lower income children due

to the achievement gap's significant reduction.³² There was a large study conducted on literacy Montessori schools called the Riley-Furman Study. It involved state test scores of over 7,000 children in South Carolina's public Montessori network. It found that children in Montessori advanced significantly more in reading than the comparison group.³³ A more recent study examined English Language Arts proficiency levels of public Montessori schools for 3rd and 8th grade. In every analysis and subgroup, Montessori schools outperformed their districts on ELA proficiency.³⁴

- 4. Improve academic achievement for English Language Learners and Students with Disabilities.** Our elementary Montessori design calls for two teachers in the classroom and that does not count the added support of paraprofessional and special educators. This will provide ample support for English language learners and students with disabilities. In addition, small group lesson structure will help students with disabilities academically as this is a proven strategy to support learning for English language learners and students with special needs. In the middle school setting, the PBL curricular approach is an ideal manner to ensure that students with disabilities benefit from learning in the Least Restrictive Environment as mandated by the Individuals with Disabilities Education Act. Differentiation is key to the Project Based Learning model, including differentiation of learning content, processes, products, and environment. Through use of this model all students at Invictus Nashville will be provided with appropriate access to the curriculum and learning activities. In addition, the structure of our school day will allow ample time for interventions from specialists and classroom teachers to meet the needs of diverse learners.

32 Lillard, A. S., Heise, M. J., Richey, E. M., Tong, X., Hart, A., & Bray, P. M. (2017). Montessori preschool elevates and equalizes child outcomes: A longitudinal study. *Frontiers in Psychology*, 8(1783), 1783. doi.org/10.3389/fpsyg.2017.01783

33 Culclasure, B., Fleming, D. J., & Riga, G. (2018). An Evaluation of Montessori Education in South Carolina's Public Schools. The Riley Institute at Furman University.

34 Snyder, A., Tong, X., & Lillard, A. S. (2021). Standardized test performance in public Montessori schools. *Journal of School Choice*. 10.1080/15582159.2021.1958058

Table 2**Academic Proficiency & Growth Ratings, 2022**

SCHOOL NAME	PROFICIENCY RATING ELA/MATH	GROWTH RATING ELA/MATH
Andrew Jackson Elementary	2.6	2.0
Dodson Elementary	2.8	3.6
Dupont Elementary	2.6	2.0
Hermitage Elementary	0.4	1.2
Hickman Elementary	3.0	2.1
McGavock Elementary	1.5	2.0
Pennington Elementary	1.6	2.0
Ruby Major Elementary	3.2	2.1
Stanford Elementary	3.6	2.0
Tulip Grove Elementary	2.8	2.0
Donelson Middle	1.6	3.3
Dupont Hadley Middle	2.8	0.7
Dupont Tyler Middle	1.2	0.2
Margaret Allen Middle	1.1	1.1
Two Rivers Middle	2.6	3.4
*Strive Collegiate Academy	2.9	4.0
Target Zone ES Average	2.4	2.1
Target Zone MS Average	2.0	2.1
MNPS District Average	3.5	N/A

¹ Tennessee Department of Education Report Card

Table 3**MNPS District 4 Demographics and Invictus Nashville Target Enrollment**

	BLACK	HISPANIC	WHITE	ASIAN + PI	ECON DIS	SP ED	ELL
District 4 School Demographics	39%	25%	34%	2%	36%	14%	18%
Invictus Nashville Targets**	30%	30%	30%	10%	40%	14%	18%

**Invictus Nashville aims to reflect demographics of the surrounding schools, with intentional recruitment of a higher proportion of Hispanic, Asian/Pacific Islanders, which is related to our goal of diversity/global competency.*

1.1.E. What the School Will Look Like When Achieving Its Mission

When Invictus Nashville is achieving its mission, there will be clear evidence of our key design elements in action, which are derived from our mission and our four core beliefs (more detail on this model in **Section 1.1.B**) but examples are provided below. For example, when Invictus Nashville is implementing the Montessori and Project Based Learning curriculum, students will demonstrate autonomy and executive function. They will be active participants in their learning by deciding on how to explore concepts during the uninterrupted work cycles with the Montessori curriculum and deciding on the best final product for their middle school projects. In addition, when our students are participating in expedition week, they will develop their heart of service, strengthen their character, and participate in different ways of learning. As our students continue with one-to-one mentoring, it will help provide healthy social and emotional habits as well as sharpen their decision making, goal setting, and planning skills. The evidence of these design elements will naturally evolve throughout our time of operation, and where appropriate, we make that distinction here. These elements will guarantee a holistic approach to educating the next generation of students and work in tandem to close the achievement gaps.

As we relentlessly implement our model and pursue our mission and vision, it will translate into timely and appropriate academic support that ensures that Invictus Nashville students thrive. Our rigorous academic programming and intensive individualized support will lead to the following results listed below by our third year of operation in the SY 26–27. Students who have only attended Invictus Nashville will have over 75% of 3rd grade students scoring proficient or advanced in ELA and Math, 100% of students making beyond one year of growth across all contents, and by school year 4, over 80% of 4th grade students will be scoring proficient or advanced in ELA and Math. By our sixth year of operation in the SY 30–31 we will achieve the following results: over 90% of 6th grade students scoring proficient or advanced in ELA and Math; 100% of students making beyond one year of growth across all contents; Qualitative goals are equally important as quantitative ones. Invictus will be achieving its mission when students can be seen and heard asking deep questions about their learning and community. We expect to see students leading discussions and pursuing lines of inquiry beyond the walls of our school. They will seek out opportunities outside of school to use their skill sets in global competence to have a larger impact on their communities. Additional qualitative goals are as follows: consistent support of and for the community. Achievement of our mission will be recruiting and enrolling a student demographic that matches our projections in **Section 1.2** and adjusts to changes and shifts in local demographics and local needs. In addition, Invictus Nashville will be achieving its mission when its staff matches the diverse demographic of its student body as well. Our commitment to community will be

realized when staff, students, and families are leading our work in community service and with partnerships for our expedition learning weeks.

Invictus Nashville’s mission will also be achieved when students and families can articulate the importance of our one-to-one mentoring program that helps build character and how it has impacted their holistic success and growth. We know that metrically our commitment to character development and social-emotional learning will directly impact our academic outcomes. We also know that this part of our mission will be evidenced by results on student and family satisfaction surveys that we will conduct quarterly. Ultimately, we also know that this part of our mission will be largely evidenced by the ability of our students to make meaningful choices that are grounded in their values and become successful leaders in their communities.

1.1.F. Describe the Innovative or Unique Features

The key design elements listed in our model align with the mission and vision of the school. The cumulation of these choices happened after months of engaging with the community to determine how these unique features foster student achievement and success.

Key Design Element #1: One-to-One Mentoring

Metro Nashville Public School has an emphasis on social and emotional learning for all schools in the district. “The goal is to help build safe and supportive environments that set the foundation for equitable, engaging, and high-quality instruction to take place. This will be done by building adult capacity and utilizing SEL best practices to meet the needs of students and teachers.”³⁵ Ensuring that students have a reliable adult in the building with consistent meetings will ensure that students get the right support at the right time which leads to a more equitable environment for all. Invictus Nashville’s mentoring program will use a research-based framework to define those all-important aspects of students’ personal development and to guide our mentoring process that we call, the Habits of Success. These Habits of Success represent “social and emotional behaviors and mindsets such as resilience, self-awareness, and a sense of belonging that support a student’s academic achievement and non-academic well-being.”¹⁶

At Invictus Nashville, we know that “one in three young people do not have a mentor in their lives”¹⁷ and we believe that 100% of students in our proposed neighborhoods have the right to the benefits that mentoring has on the lives of those exposed to it. Invictus Nashville will ensure that a teacher dedicates time weekly to talk one-on-one with the student. These sessions will give students a deeper connection with a teacher and provide a safe space for students to go for support, academic or otherwise. Mentors help students find motivation after a setback, refine their goals, and connect their experiences at school with opportunities beyond graduation. This investment will ultimately build a school with outcomes that match our mission—that all students can find their unique path to professional and personal freedom.

The importance of a mentor who is “a person of greater experience and seniority ... a teacher, adviser or sponsor” was first acknowledged by Levinson, Darrow, Klein, Levinson and McKee in their seminal book on career development.³⁶ A number of mentoring research studies have supported Levinson et al.’s assumption that the mentor is “one of the most complex and developmentally important relationships” in young adults’ personal and professional lives.³⁷ At Invictus Nashville mentors will provide support to

35 Metro Nashville Public Schools. (2022). Social Emotional Learning—Metro Nashville Public Schools. Social Emotional Learning. Retrieved July 5, 2022, from https://www.mnps.org/learn/supporting_our_students/sel

36 Kraft, Matthew A., Alexander Bolves, and Noelle M. Hurd. (2021). School-based Mentoring Relationships and Human Capital Formation (EdWorkingPaper: 21-441). Retrieved from Annenberg Institute at Brown University: <https://doi.org/10.26300/96bs-6m26>

37 Campbell, C. M., Smith, M., Dugan, J. P., & Komives, S. R. (2012). Mentors and college student leadership outcomes: The importance of position and process. *The Review of Higher Education*, 35(4), 595–625

students while they practice important learning skills. They do this by helping students deal with stress in positive ways, exploring academic options, coaching students on the Habits of Success which are social and emotional skills that enable students to be successful at both academic and non-academic pursuits. Mentors are a key part of the Invictus Nashville model because they help students learn to succeed on their own.

Educators have long been using mentoring as a strategy for student success. The rationale for mentoring is that supportive adults can serve as mentors and can help students avoid high-risk activities and make more successful transitions to adulthood.³⁸ Research on mentoring suggests that programs that employ specific and targeted approaches have more positive outcomes for students.³⁹ Invictus Nashville's mentoring component will reflect the core findings of this research in several ways. Our model does not rely on a non-specific, friendship-driven approach. While connection, trust, and relationship-building are indeed essential, they are not the sole focus. Instead, our mentoring model also emphasizes targeted goal setting, accountability, support, and future-focused thinking.

So, how will we ensure that the mentoring program at Invictus Nashville employs targeted skills designed to match the presenting concerns of mentees? We will provide mentors and their students space to document their reflections, list goals, and track progress toward achieving those goals. The mentoring conversations will revolve around goals, Habits of Success (such as executive function and agency), and longer-term dreams the student has for their life and career outside of school (more detail on this model in **Section 1.1.F**).

It is our job to create an environment where students receive the right support at the right time. We know that providing every child with a rigorous academic program designed to offer children opportunities to develop their own capabilities leads to increased outcomes of academic achievement. Historically, there are inequitable outcomes for learners in schools. The overall success rate for students in Davidson County in English and Mathematics was between 24—28% based on the 2022 TNReady results.⁴⁰ At Invictus Nashville we believe it is our responsibility to create learning environments that give all students access to understanding their unique capabilities and a way to safely struggle productively on this journey of discovery. We will accomplish that through a commitment to one-to-one mentoring and high support for all children. High challenge, high support at Invictus Nashville is characterized by increasing classroom participation and leadership, data-informed decision making in planning and execution, differentiation for all, and infusing choice into the design of our school. Each of these components will make students the driver of their learning.

Key Design Element #2: Montessori Curriculum grounded in Uninterrupted Work Cycles

The uninterrupted work period is fundamental to the Montessori approach, which recognizes and respects individual variations in the learning process. Within the Montessori environment, the children need to have time to work through various tasks and responsibilities at their own pace. This

38 Bernstein, L., Rappaport, C. D., Olsho, L., Hunt, D., & Levin, M. (2009). Impact evaluation of the US Department of Education's Student Mentoring Program. Final Report. NCEE 2009-4047. National Center for Education Evaluation and Regional Assistance.

39 Christensen, K.M., Hagler, M.A., Stams, GJ. et al. Non-Specific versus Targeted Approaches to Youth Mentoring: A Follow-up Meta-analysis. *J Youth Adolescence* 49, 95972 (2020)

40 MNPS. The 2021-2022 District Level Results (n.d). <https://www.tn.gov/content/dam/tn/education/press-releases/2021-22%20TCAP%20District%20Level%20Results%20PPT.pdf>

uninterrupted work period is vitally important, as that is when the building of coordination, concentration, independence and order, and the assimilation of information are able to occur.⁴¹

Montessori believed that “children need sufficient time to delve into work, to concentrate and to develop their inner guides.”⁴² She considered that this required amount of time allows for a child to progress into the most in-depth concentration and intellectual exploration, resulting in the most significant growth. Metro Nashville Public School has an emphasis on focused outcomes for each grade band. The belief that “students and their families should know that if they meet objective academic and attendance goals while making appropriate progress in developing social-emotional skills such as self-management and decision-making at each stage of their K–12 career, they will consistently advance, grow and ultimately graduate.”⁴³

Research shows “children of different ages help one another. The younger ones see what the older ones are doing and ask for explanations.”³⁷ At Invictus Nashville, children in grades K–5 are placed in multi-age learning groups instead of being grouped by grades. This enables children to teach and learn from each other. A child who has mastered a learning objective reinforces her/his own learning by teaching that lesson to a younger child. “Children develop in this environment through activity itself, but they need material means, guidance and an indispensable understanding. It is the adult who provides these necessities. If the adult does less than is necessary, the child cannot act meaningful, and if the adult does more than necessary, they impose themselves upon the child, extinguishing creative impulses.”⁴⁴ This is the approach that our teachers are trained to take during their intensive training. Invictus will allow a child to struggle with a project or a problem long enough to learn from it, but not so long that they become frustrated by it. It is a skill that our teachers possess and practice. During our uninterrupted work cycles, the ideal is that the children identify, engage in, and pace their own learning independently, with the teacher available to guide them and, of course, to teach them, but in just the right amounts.

Elementary Uninterrupted Work Cycles

The academic program at Invictus offers a holistic education that incorporates many strategies to increase student achievement. The Montessori curriculum and pedagogy center on individualized instruction, use of sensorial materials, choice in work, and encouragement of intrinsic motivation. The uninterrupted work cycle will allow teachers to facilitate learning by following the natural development of the child through hands-on and inquiry-based lessons. This process not only addresses the subject material that our students are required to master but also helps develop their lifelong learning skills. The elementary classes at Invictus Nashville will be substantively different from a traditional classroom; every item has a specific use or purpose and there is nothing that the child cannot see or touch.⁴⁵ It is a very carefully prepared environment that is specifically designed to support the pedagogy. At Invictus, the uninterrupted work cycle will allow a productive atmosphere where joy, respect, freedom, responsibility, and social and intellectual development spontaneously flourish.

The uninterrupted work period is fundamental to the Montessori approach, which recognizes and respects individual variations in the learning process. Within the Montessori environment, the children need to have time to work through various tasks and responsibilities at their own pace.

41 The Montessori uninterrupted work period. Montessori Resources for Schools, Teachers, Families and Parents. (n.d.). Retrieved July 6, 2022, from <https://amshq.org/Educators/Membership/Member-Resources/The-Montessori-Uninterrupted-Work-Period>

42 Lillard, A. S. (2005). *Montessori: The science behind the genius*. New York: Oxford University Press. Montessori, M. (1914/1965). *Dr. Montessori’s own handbook*. New York: Schocken.

43 Focused Outcomes, MNPS (2022) https://www.mnps.org/learn/supporting_our_students/focused_outcomes

44 Lillard, A. S., & Else-Quest, N. (2006). Evaluating Montessori education. *Science*, (313) pp. 1893—1894.

45 Ball, T. N. (2018). *Examining The Intergrity Of Teaching Strategies In A Diversely Populated Montessori Public Elementary School: A Narrative Analysis* (dissertation). Macon, GA.

This uninterrupted work period is vitally important is when the building of coordination, concentration, independence and order, and the assimilation of information are able to occur during this time.³⁶ Randomized control design studies have found superior outcomes on academic and pre-academic assessments for children who attended Montessori preschool and elementary schools compared to non-Montessori control group children.³⁹ At Invictus, a three-hour uninterrupted work cycle will provide large blocks of unscheduled time to ensure that individual children have the time to settle into a task that interests them and are not unnecessarily interrupted when they are engaged in a worthwhile activity. During the work period, teachers observe the behaviors of the children and invite individuals and small groups to short lessons when they see opportunities to assist a child's progress.

"Research also suggests positive long-term impacts when comparing high school students who attended Montessori preschools and elementary schools to a control group matched on gender, race/ethnicity, socioeconomic status, and high school attended."³⁹ Students at Invictus will be engaged in developmentally appropriate work at the elementary level.

The work will include Montessori hands-on materials that are appropriate for the individual needs of each student. The teacher will be working with students individually and in small groups, in hands-on engaging Montessori lessons. Students will be collaborating as they work on a task or research project together. Students are also managing work expectations. A contract, work plan, or work journal may be used to help with organization and time management skills. At the Elementary level, full-class lessons should not take place during the uninterrupted work cycle. Rather, they should be presented before or after the uninterrupted work cycle. Teachers will be trained in the art of observation per the Montessori approach to accomplish this widened access for all students. **Section 1.9** details this approach. Teachers will engage in regular lesson study and feedback protocols with an eye on differentiation to ensure that there are multiple access points for all students.⁴⁰ This is an opportunity to access challenging content through high levels of intentionally designed support, regardless of learning style.

Key Design Element #3: Middle School Project Based Learning.

We will empower students to be active participants in directing their learning experience through a rich and rigorous Project Based Learning (PBL) curriculum. These projects are purposeful multidisciplinary projects centered largely around projects that relate to the real world. We know that learning opportunities that are relevant and grounded in students' lives are richer and increase student motivation.⁴⁶ Academic learning will be coupled with community engagement and the development of the Habits of Success through mentoring. Research shows that a "metacognitive approach to instruction can help students learn to take control of their own learning by defining learning goals and monitoring their progress in achieving them."⁴⁷ For middle school students at Invictus, project-based learning will follow the High-Quality Project Based Learning Model. It embodies the self-managed and self-directed learning processes. Hattie describes and views "students as active agents who monitor and control their learning."⁴¹ Comprehensive and varied assessments will ensure that our careful blending of best practices for achieving equitable results for all students with child centered PBL methods results in high performance, establishing our students as leaders prepared for meaningful lives.

The projects for middle school will come from the Summit Learning Curriculum which are aligned to the Summit Learning Cognitive Skills rubric, which is used throughout grades 4–12. The Summit Learning Cognitive Skills Rubric is an assessment and instruction tool that outlines the continuum of skills that are necessary for college and career readiness. "Cognitive Skills are interdisciplinary skills that require higher order thinking and application, such as Making Connections and Inferences and Evaluating Arguments.

⁴⁶ John Larmer, John R. Mergendoller, and Suzie Boss, *Setting the Standard for Project Based Learning: A Proven Approach to Rigorous Classroom Instruction* (Alexandria, VA: ASCD, 2015).54-65.

⁴⁷ Gay, Geneva. *Culturally Responsive Teaching: Theory, Research, and Practice*. Teachers College Press, 2018.

The rubric includes 36 skills and eight score levels applicable to students in grades 4 through 12.”⁴⁸ The projects will also be aligned to a set of standards such as the Tennessee Academic Standards, Illustrative Mathematics, Next Generation Science Standards, C3 Frameworks dependent on the subject area. These projects and their associated standards will allow students to connect what they are learning to life beyond the classroom, sparking curiosity and enthusiasm for their lessons. Whether they are working on projects individually or together with peers, “students learn and refine skills, such as working with a team, interpreting data, or presenting a persuasive argument.”⁴⁹

Project Based Learning

“Project-Based Learning (PBL) is an innovative approach to learning that teaches a multitude of strategies critical for success in the twenty-first century. Students drive their own learning through inquiry, as well as work collaboratively to research and create projects that reflect their knowledge.”⁵⁰ At Invictus Nashville, students will share what they have learned at the end of every project. They can do this through essays, presentations, lively structured debates, or other creative ways that relate to the specific project. While students are directing the project work together, teachers oversee their progress, and give feedback along the way. When they see the opportunity for deeper learning or to help students who fall off course, teachers use class time to work with students individually or in small groups to provide specific support. With projects, students are learning both the subject matter and how to direct their own progress toward their end goal for the project.

Our unique model allows us to provide every student with an enriched curriculum that emphasizes experiential and project-based learning (PBL). PBL is a rigorous method where students are challenged to think critically and work collaboratively to discover solutions to questions grounded in complex, real-world scenarios. At Invictus Nashville each PBL unit, students gain a deeper and more meaningful understanding of the content and thereby retain knowledge longer than is often the case with traditional instruction. Coupled with Design Thinking strategies, students learn how to take initiative, empathize, problem-solve, collaborate, and communicate more effectively.⁴⁴

Through each PBL unit, students are actively engaged in their learning and are provided ample and meaningful opportunities to develop 21st-century skills while addressing real-world issues. This type of learning is a natural progress from their Montessori elementary experience. It offers students an opportunity to continue to take ownership of their education. At Invictus, PBL emphasizes student inquiry and empowers students to actively explore challenging, complex issues and ideas. Nothing about learning at Invictus will be scripted. Student choice drives the investigative learning process. Although every student is asked the same driving question, each PBL unit results in a multitude of different projects and creative solutions. PBL improves student learning. Students gain a deeper understanding of the content and remember and retain it longer as they complete a PBL unit. This happens more often than is often the case with traditional instruction. Students learn how to take initiative and responsibility, build confidence, problem solve, and collaborate more effectively when engaged with PBL projects.⁵¹

Key Design Element #4: Community Service

Research from the National Education Longitudinal Study determined that students who volunteered did better in reading, history, science, and math and were more likely to complete high school.⁴⁴ This is

⁴⁸ John Hattie, *Visible Learning* (New York, Routledge, 2009)

⁴⁹ Fadel, C., Bialik, M., & Trilling, B. (2015). *Four Dimensional Education: the Competencies Learners Need to Succeed*. Boston: Center for Curriculum Redesign.

⁵⁰ Summit Learning. 2022. Summit Learning. [online] Available at: <https://www.summitlearning.org/approach/learning-experience/projects> [Accessed 21 July 2022].

⁵¹ Norman, C. (2015). *Perceptions of Non-Traditional Programs within Missouri School Districts* (dissertation). Saint Charles, MO.

because students are able to see how their schoolwork applies to the real world, keeping them interested in what they are learning. Many students experience multiple benefits from community service programs. “Community service helps [students] to mature by developing social skills, doing outreach or public relations tasks. Additionally, students get to network with professionals in a way that they might not otherwise be able to just by going to class,”⁵²

These connections are made, students find they have valuable references that can lead to other career opportunities later. Finally, volunteering allows students to make an important contribution to an organization or their field of interest without the pressure of a regular part time or full-time job. Some of these volunteering jobs may lead to an internship or a paid position, but even if that does not happen, the projects teach responsibility and work ethic to those who take them seriously.”⁴⁵

Engaging in community service provides students with the opportunity to become active members of their community and has a lasting, positive impact on society at large. Community service or volunteerism enables students to acquire life skills and knowledge, as well as provide a service to those who need it most. The following are some of the common benefits of participating in a community service program:

1. **Psychological:** Volunteering increases overall life satisfaction and helps you feel good about yourself because you are helping others. It can also help to decrease stress and ease depression.
2. **Social:** Volunteering engages students with the community, creates special bonds with the population being served, and increases social awareness and responsibility.
3. **Cognitive:** Volunteering helps students enhance their personal knowledge, grow from new experiences, and develop better interpersonal communication skills.⁵³

Community Service

Schools should be in the community they serve. While we certainly believe this means schools should physically be in their communities, Invictus Nashville will focus on community service and partnerships that will enhance learning and community pride within our school design. Invictus Nashville aims to keep students in families in this district for their K–12 academic journey. The intentional choice to embed community service in conjunction with local partners will ensure that our school is breaking down the walls that it exists in—partnering with organizations and experts in the community that our students can learn from consistently throughout their education.⁵⁴ Success would look like K–8 students making connections to their academic work, future aspirations, and the community that they are serving. While in middle school this will look like staff-initiated partnerships for students to be in their community, student success would look like the pursuit of volunteer experiences on their own time to continue these partnerships formed through our programming and developing relationships with their community.

Schools should be of the communities they serve. Part of being “of” the community means being a school that represents the diversity of the community. Our mission at Invictus Nashville in supporting students to engage with their communities begins with being of that community—creating an environment that exposes students and families to difference and celebrates the value of that difference through our

52 Stephanie Bell (2010) Project-Based Learning for the 21st Century: Skills for the Future, *The Clearing House: A Journal of Educational Strategies, Issues and Ideas*, 83:2, 39-43, DOI: 10.1080/0009865090350541

53 Ingels, S. J., Curtin, T. R., Kaufman, P., Alt, M. N., Chen, X., & Owings, J. A. (2002). *Coming of Age in the 1990s: The Eighth-Grade Class of 1988 12 Years Later. Initial Results from the Fourth Follow-Up to the National Educational Longitudinal Study of 1988. Statistical Analysis Report*

54 Stenger, M., & Stenger, M. (2013, May 23). *Students Can Benefit from Participation in Community Service Studies Show*. InformED. <https://www.opencolleges.edu.au/informed/other/students-can-benefit-from-participation-in-community-service-studies-show-4147/>

curriculum as well as our community service efforts. The natural diversity of the Donelson/Hermitage cluster will support this exposure and make connections that will lower the attrition rate and keep families in this cluster for middle and high school. Students and families will know that at Invictus Nashville, regardless of culture, they will be celebrated and valued, because we are designing our school with that celebration in mind and intentional service acts that will service all populations.

Key Design Element #5: Expedition Weeks

At Invictus Nashville, we believe students should have ample opportunities to dive into diverse fields of study and try their hand at different pathways so they can develop a sense of purpose and concrete next steps that work for them. At the core of everything we do is our mission to prepare our students to find their unique path to professional and personal freedom. The Expeditionary Learning journey is designed to help students discover what they find fulfilling by uncovering what sparks their curiosity. Regardless of whether their journey to finding their sense of purpose is a direct route or a windy road, they are learning the whole way.

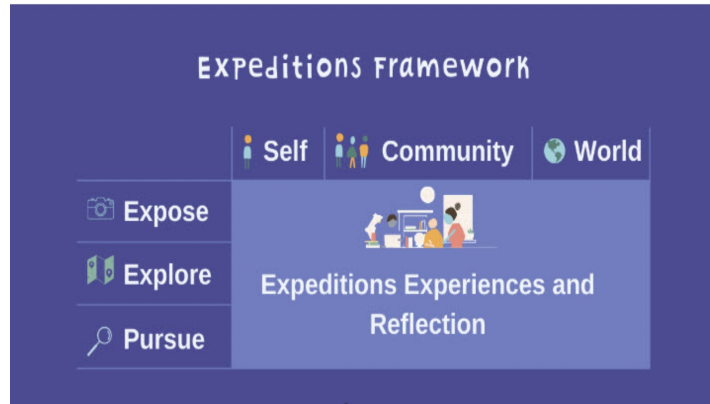
We take this a step further by proposing a school that learns in its community as well—a school where students are learning from and alongside residents and experts in their neighborhoods and city. The learning that occurs alongside experts in their community will supplement the learning they are doing in the classroom in content, and it will also result in greater 21st-century skill development. Students are now being required to enter the world with new “soft” skills that they previously were not expected to have practiced and mastered.⁵⁵ Mastering 21st-century skills can be what separates students who are prepared for a complex living and professional environment from those that are not, and we believe learning within, alongside, and from their community will promote creativity and innovation, critical thinking problem solving, communication, and collaboration in Invictus Nashville students. These skills will make them more competitive in a local, regional, national, and global market, regardless of the route they and their families choose when they graduate from Invictus Nashville.

What exactly does that mean for your student? During the seventh week of each quarter, students can explore a wide variety of topics, such as visual arts, graphic design, film production, engineering, entrepreneurship, and external internships. The topics will be determined based on community partnerships and student interest. Students are immersed in new situations that expand their imagination of possible career paths. Expeditionary learning is critical for a student to reflect on their sense of purpose, and ultimately develop a concrete next step. The expedition framework is based on how students see themselves individually, themselves in the community, and themselves in the world. This will develop and change over time but at Invictus students will be able to have the ability to be exposed to different fields, explore, and pursue with the support of our staff. Please see a picture of the framework below.

⁵⁵ Battelle for Kids. “Framework for 21st Century Learning: A Unified Vision for Learning to Ensure Student Success in a World Where Change is Constant and Learning Never Stops.” Battelle for Kids, 2019

Figure 3

Expeditions Framework



1.2. Enrollment Summary

In this section:

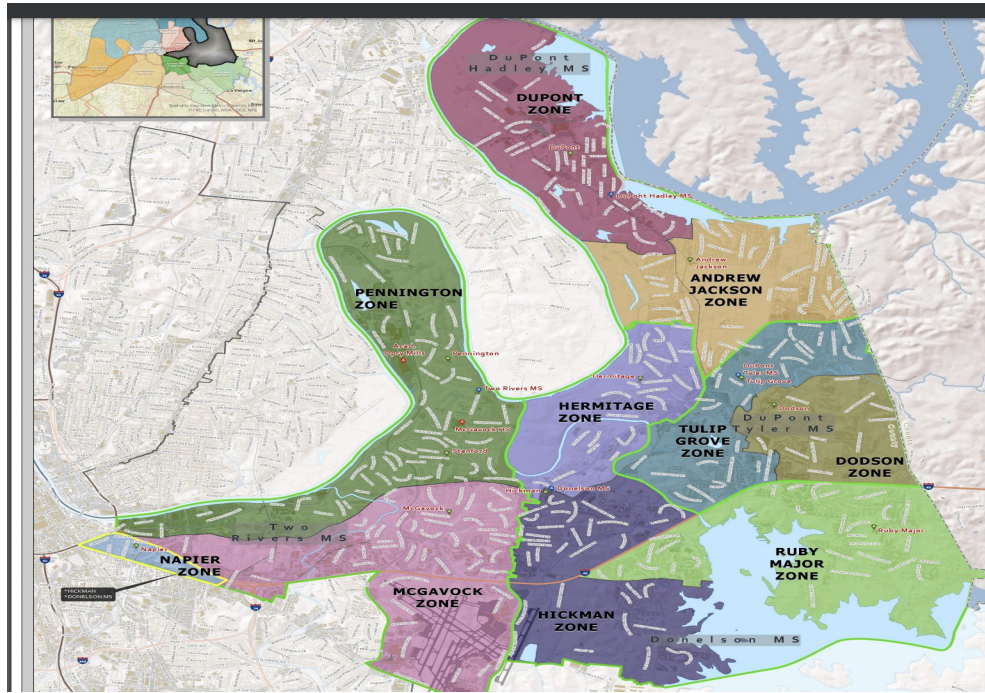
- Describe the community from which the proposed school intends to draw students, including the demographic profile and the school zones of the schools currently in operation within the proposed community.
- Provide a rationale for selecting the community where the proposed school will locate.
- Discuss the academic performance and enrollment trends of existing schools in that community.
- Describe the specific population of students the proposed school intends to serve.
- Describe what the proposed school would do more effectively than the schools that are now serving the targeted population. What different educational options will the proposed school offer?
- Describe any enrollment practices, processes, and policies of the proposed school that will differ from your existing school(s); and how the community for the proposed school is similar and/or different from the community that you currently serve.
- Complete the enrollment summary and anticipated demographics charts below.

1.2.A. Community and Demographics

Pursuant to Tennessee Code Annotated Ann. §49-13-113, Invictus Nashville will accept any new student that resides in Davidson County so long as we have seats available. We also believe deeply in schools serving the community they are geographically located in, and therefore, we propose a school that is in the Donelson, Hermitage, and Old Hickory areas which is known as the McGavock cluster. The targeted areas are in the northeast portion of the district. Northeast Nashville is a very diverse community and growing. A key feature of our PBL approach is community-based projects with partnering organizations as we work together to address local challenges and positively impact our community. This location also provides optimal transportation access via I-40 and Briley Parkway.

Figure 4

MNPS MAP OF DISTRICT 4



As a diverse-by-design school, we intentionally do not target one subgroup of students, but aim to attract a student body that reflects the racial, socioeconomic, cultural, and linguistic diversity of Northeast Nashville. A demographic profile of students in Northeast Nashville schools and our aim to enroll a student body with similar demographics was first introduced in **Table 4** below.

Table 4

MNPS District 4 Demographics and Invictus Nashville Target Enrollment

	Black	Hispanic	White	Asian + PI	Econ Dis	Sp Ed	ELL
District 4 School Demographics	39%	25%	34%	2%	36%	14%	18%
Invictus Nashville Targets**	30%	30%	30%	10%	40%	14%	18%

**Invictus Nashville aims to reflect demographics of the surrounding schools, with intentional recruitment of a higher proportion of Hispanic, Asian/Pacific Islanders, which is related to our goal of diversity/global competency.*

1.2.B. Rationale for Proposed Community

Invictus Nashville proposes this zone as our target community for three primary reasons:

1. A lack of quality options for elementary and middle schools in District 4;
2. A lack of equitable school choice options, and
3. The high attrition rate from elementary to high school.

Families in District 4 lack quality options for schools elementary and middle schools. The academic performance of the elementary and middle schools in Invictus Nashville’s target zone trails behind the performance of the district and the state considerably. The district accountability report for the past five years has shown that three out of the five target zone middle schools have been or currently are on the targeted support and improvement list accompanied by the one charter middle school in the area. **Table 5** shows proficiency in Math and ELA on the TNReady assessment for elementary and middle schools in our target enrollment area of Hermitage/Donelson/Old Hickory. TNReady is administered in grades 3–8 so proficiency rates for a school represent performance across those grade bands (3–4 for elementary schools, 5–8 for middle schools). The table also shows the growth rating for each school. There is variation in achievement across schools in this area, but overall schools in this area demonstrate low performance and the majority underperform district average proficiency rates. Our aim is for all student subgroups to outperform local and statewide comparison groups in English and Math Proficiency. The performance for elementary and middle schools in the target zone can be seen in **Table 5** is reproduced below.

Table 5**Academic Proficiency and Growth Ratings, 2022**

SCHOOL NAME	PROFICIENCY RATING ELA/MATH	GROWTH RATING ELA/MATH
Andrew Jackson Elementary	2.6	2.0
Dodson Elementary	2.8	3.6
Dupont Elementary	2.6	2.0
Hermitage Elementary	0.4	1.2
Hickman Elementary	3.0	2.1
McGavock Elementary	1.5	2.0
Pennington Elementary	1.6	2.0
Ruby Majors Elementary	3.2	2.1
Stanford Elementary	3.6	2.0
Tulip Grove Elementary	2.8	2.0
Donelson Middle	1.6	3.3
Dupont Hadley Middle	2.8	0.7
Dupont Tyler Middle	1.2	0.2
Margaret Allen Middle	1.1	1.1
Two Rivers Middle	2.6	3.4
*Strive Collegiate Academy	2.9	4.0
Target Zone ES Average	2.4	2.1
Target Zone MS Average	2.0	2.1
MNPS District Average	3.5	5

¹ Tennessee Department of Education Report Card

In addition to the elementary and middle school data, McGavock High School represents the primary zoned high school for our target zone. The ACT average score has been 18.5 for the past three years.¹ The overall low academic performance and lack of options are reasons that we believe that there is high attrition in from elementary to high school. More specifically, further analysis of District 4’s enrollment shows a total of 6,163 students enrolled in elementary and middle schools in the 2022–2023 school year. There are 2,101 students enrolled in the only high school for the zoned area.⁵⁶ This shows a decline from elementary to high school of about 4,062 students which indicates that students are leaving this area for other options. Invictus Nashville aims to keep students in this cluster by providing another option for families, more details can be found in the following sections.

School choice in Davidson County is predominantly characterized by magnet and charter schools with varying enrollment models that determine their lottery systems—some are completely open enrollment across the entire district, some are a portion open enrollment across the district and a portion zone seats, while still others are an open enrollment lottery proportional to population of school district seats. We believe that Davidson County has made great strides in pursuing equity in their enrollment process, but the fact remains that there is always the potential for inequity when families must pursue quality schooling options that are not located in the neighborhoods where they live.

1.2.C. Academic Performance, Achievement Gaps, and Enrollment Trends

The next section will provide a comprehensive needs assessment of our proposed community including:

1. Academic performance
2. Achievement gaps
3. Enrollment trends

First, we present current data for each area of the needs assessment. Then we detail the ways in which Invictus addresses these needs more effectively than the schools that are now serving the targeted population. Through this needs analysis we aim to show how Invictus will prove to be an effective partner with MNPS in addressing challenges in our proposed community.

Academic Performance

When compared with schools across the state and the country, schools in northeast Nashville are achieving low academic results. **Table 6** shows ratings from GreatSchools.org for the elementary and middle schools in our proposed community. The Summary Rating is a multi-measure school quality metric intended to reflect how well a school is preparing students for postsecondary success. The Summary Rating is an aggregation of a school’s Themed ratings, including Student Progress or Academic Progress, College Readiness, Equity, and Test Scores. While this rating system provides a simplified portrayal of a school’s academic performance, it is a helpful measure for comparing schools locally and nationally and is widely used by families when evaluating schools for their children. We include each school’s overall score, test score, and equity score. This last measure demonstrates that while some schools may have higher than average overall ratings or test scores, data indicates that they are not equitably meeting the needs of all students.

The GreatSchools Equity Rating is a measure of a school’s success in serving disadvantaged students and in ensuring all student groups achieve similar levels of academic performance. Our Equity Rating now incorporates a broader set of student-outcome metrics in addition to proficiency scores (which tend to correlate strongly with race and income). In addition to proficiency scores, our new methodology includes

⁵⁶ *Open data portal*. Metro Nashville Public Schools. (n.d.). Retrieved January 14, 2023, from <https://www.mnps.org/about/communications/opendata>

college readiness metrics (e.g., college entrance exam performance, high school graduation rates), and measures of student- or academic progress (growth or growth proxy).

To evaluate a school's success in educating disadvantaged students, our Equity Rating includes two components: the performance of disadvantaged students using multiple outcome measures and the relative size of in-school gaps between disadvantaged and advantaged students. The two components are computed and combined in a series of four steps: 1. Determining statewide disadvantaged groups, 2. Aggregating school performance across disadvantaged groups, 3. Calculating in-school gap weights, and 4. Computing the equity rating. The GreatSchools Test Score Rating is computed based upon the percent of students scoring proficient or above on their state's standardized assessment in each grade and subject. This process includes the computation of both overall school-level Test Score Ratings and Test Score Ratings for groups of students within each school.

Table 6**Greatschools.org Ratings for ES and MS in Proposed Community**

SCHOOL NAME	OVERALL SCORE	TEST SCORE	EQUITY SCORE
Andrew Jackson Elementary	5	7	4
Hermitage Elementary	3	2	2
Hickman Elementary	3	3	2
Dodson Elementary	4	2	2
Dupont Elementary	5	2	2
McGavock Elementary	4	3	2
Pennington Elementary	7	5	7
Ruby Major Elementary	5	4	2
Stanford Elementary	7	6	8
Tulip Gove Elementary	4	3	3
Donelson Middle	4	2	2
Dupont Hadley Middle	4	3	3
Dupont Tyler Middle	3	1	2
Margaret Allen Middle	3	2	1
*Strive Collegiate Academy	3	3	3
Two Rivers Middle	3	2	1
*Average of ES/MS in target zone	4.19	3.13	2.88

*Denotes Public Charter School

Achievement Gaps

MNPS district data reveals persistent gaps in critical measures of academic performance and opportunity across student subgroups. **Table 7** highlights achievement gaps for three special populations: ELL

students, economically disadvantaged students, and students with disabilities across MNPS. We examine the district grade band success rates.

The District Grade Band Success Rates are assessed based on the percent of students who met or exceeded grade-level expectations on state math and ELA assessments. The three grade band success rates are reported: 3-5 Success Rate, 6-8 Success Rate, and 9-12 Success Rate. The Grand Band Success Rates are calculated based on the student population for whom the district is accountable, not where students were tested. The one-year success rate represents the percentage of students whose score met expectations or exceeded expectations on math and ELA state assessments. The figure above shows this district's success rate in comparison with the state. Success rate tells us how many students are succeeding on state exams and helps demonstrate how well districts are helping students master grade-level academic standards.

Table 7

DISTRICT SUCCESS RATE

	ALL STUDENTS	ELL STUDENTS	ECONOMICALLY DISADVANTAGED	STUDENTS W/ DISABILITIES
English and Math Success Rate				
TN Ready 3–5	26.2%	14.2%	13.4%	11.8%
TN Ready 6–8	22.5%	9.3%	11.3%	9.8%
TN Ready 9–12	20.4%	3.2%	6.8%	9.2%

***Note: Measures for “All Students” include measures for ELL and Economically Disadvantaged students, so the gaps are even greater should you compare, for example, ELL students with non-ELL students. Due to the way the data is made available and for the purposes of this report we present the measures for all students, ELL, and Economically Disadvantaged students.*

Enrollment Trends

An examination of enrollment trends in MNPS and our proposed community of Northeast Nashville must evaluate an alarming trend: difficulty retaining students in schools, particularly in our targeted cluster.

Table 8 demonstrates declines in total enrollment in MNPS, despite overall population growth in Davidson County of around 5% in the past four years. The table also shows that enrollment percentage has increased for two high needs populations: Students with Disabilities, and English Language Learners.

Table 8**MNPS Enrollment Trends**

	2018–2019	2021–2022
Total Enrollment	85,161	77,479
Economically Disadvantaged	38.0%	35.5%
Students with Disabilities	11.8%	13%
English Language Learners	18.1%	27%

The degree to which families demonstrate dissatisfaction with zoned school options and exercise choice including electing charter schools, district choice schools, and private schools in our target community is worth exploring. **Table 9** shows that a significant portion of families exercise choice in all school zones in our proposed community.⁵⁷ All clusters include a significant proportion of students out of zone in MNPS choice schools or charter schools. **Table 9** provides the data for our proposed community. It is worth noting that the number one out of zone school is a magnet school in the district which makes the selection process that much more rigorous.

Table 9**Percent of Students in Choice Schools McGavock Cluster**

SCHOOL CLUSTER	% OUT OF ZONE (DISTRICT CHOICE AND CHARTER)	#1 OUT OF ZONE SCHOOL	% PRIVATE SCHOOL
McGavock	27%	Martin L. King Jr.	16.4%

A 2013 study found that attrition rates in MNPS remain steady at around 9% across elementary school and jump to 10.8% in fifth grade, the year that students transition from elementary to middle school in MNPS. Quantitative data were supported by qualitative findings that parents experience apprehension about the quality of middle school options in MNPS, and at this juncture are more inclined to explore choice options or leave the district for private schools or schools in surrounding counties.⁵⁸

1.2.D. Target Population

As a public charter school, Invictus Nashville Charter School will serve any student in Davidson County regardless of race, socioeconomic status, previous achievement level, learning ability, English language proficiency, or zip code. Our target population, though, will be a diverse by design population, as shown in

⁵⁷ Nashville Area Chamber of Commerce 2019 Education Report Card

⁵⁸ Johnson, E., Natrass, T., & Phillips, J. (2013). Clarifying the Complexity of MNPS Student Departure: Who Leaves, When, & Why? Vanderbilt University. Peabody College.

Table 3. Justice Thurgood Marshall once wrote, “Unless our children begin to learn together, there is little hope that our people will ever begin to live together.”⁵⁹ We align with this philosophy, and we know that research shows the value of diversity on learning and holistic development.

When comparing students of similar backgrounds, those who attend schools with higher levels of diversity in the student body experience higher average test scores and higher graduation rates—both gaps in our target zone currently.⁶⁰ The benefits of students learning in diverse classrooms are both academic and more holistic—stronger critical thinking skills, more creative problem solving, an increase in motivation, and reducing racial bias.⁶¹ Part of the vision of Invictus Nashville Charter School is to cultivate young adults with a diverse worldview that will become leaders in their communities to pursue a more equitable Nashville today, tomorrow, and when our students become the leaders of our city. A diverse by design student population will help realize that vision. Research shows that students who learn in diverse learning environments throughout their education are more likely to live in diverse neighborhoods beyond graduation.⁶²

We will maintain diversity by making sure our student body is representative of the diversity of the Hermitage/Donelson population. Our target student demographic breakdown would be 30% Hispanic, 30% Black, and 30% White, and 10% Asian. Data in the previous section demonstrates that existing schools in Northeast Nashville are producing low academic performance and achievement gaps for special student populations. In addition, enrollment trends show a desire for choice and failure to retain students in district schools. Invictus Nashville will more effectively address these challenges through careful interweaving of innovative academic and school structures as described below.

1.2.E. Effectiveness of Invictus Nashville Charter School

Slow Growth Model

Invictus Nashville proposes a school that follows a slow growth model, starting with kindergarten and first grade cohorts in 2024 and adding a grade each year until we are fully grown at K–8th in 2031. We also propose conservatively scaling our enrollment numbers to ensure the success of our model over time, proposing to only enroll 72 kindergartners in year one along with our 72 first graders, and continuing that trend until middle school. At middle school, we will allow an entrance opportunity for an additional group of approximately 48 students to achieve 120 at each grade level. Research out of Stanford University on charter school growth shows that a slow growth model leads to longer term academic and holistic success over time, which can likely be drawn back to the time, attention, and support given to inaugural cohorts to establish strong school culture.⁶³

⁵⁹ Thurgood Marshall, *Milliken v. Bradley Dissenting Opinion* (1974).

⁶⁰ National Assessment for Educational Progress (NAEP), *NAEP Data Explorer*, 2011, <http://nces.ed.gov/nationsreportcard/naepdata/>; and C. Lubienski, and S. T. Lubienski, “Charter, private, public schools and academic achievement: New evidence from NAEP mathematics data,” *National Center for the Study of Privatization in Education*, Teachers College, Columbia University, January 2006; G. Palardy, “Differential school effects among low, middle, and high social class composition schools,” *School Effectiveness and School Improvement* 19, no. 1 (2008):37.

⁶¹ J. Boisjoly, G. J. Duncan, M. Kremer, D. M. Levy, and J. Eccles, “Empathy or antipathy? The impact of diversity,” *American Economic Review* 96, no. 5 (2006): 1890–1905; S. E. Page, *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies* (Princeton, NJ: Princeton University Press, 2008), <http://press.princeton.edu/titles/8757.html>

⁶² K. J. R. Phillips, R. J. Rodosky, M. A. Muñoz, and E. S. Larsen, “Integrated schools, integrated futures? A case study of school desegregation in Jefferson County, Kentucky,” *From the courtroom to the classroom: The shifting landscape of school desegregation*, edited by C.E. Smrekar and E.B. Goldring, (Cambridge, MA: Harvard Education Press, 2009), 239–70.

⁶³ Peltason, Emily, and Margaret Raymond. “Charter School Growth and Replication.” *Center for Research on Education Outcomes Volume I*. January 30, 2013. <https://credo.stanford.edu/pdfs/CGAR%20Growth%20Volume%20I.pdf>.

Mentoring

Metro Nashville Public School has an emphasis on social and emotional learning for all schools in the district. “The goal is to help build safe and supportive environments that set the foundation for equitable, engaging, and high-quality instruction to take place. This will be done by building adult capacity and utilizing SEL best practices to meet the needs of students and teachers.”²⁹ At Invictus Nashville, students will have weekly one-to-one mentoring provided by a teacher. These teachers will be assigned a group of no more than 12 students that we will know on a deeper level than other teachers in the building. The teacher-mentor relationship will extend to the family so that everyone has a personalized point of contact.

Invictus’ holistic approach to student development, and our approach to character education and social-emotional learning will be distinguishable from other programs like it by our focus on engaging a child’s entire village in the creation, refinement, and implementation of these plans via their mentor. We deeply believe that the support of all student needs comes from collaboration and sharing expertise amongst all those invested in a child’s development.

Children learn best when the significant adults in their lives—parents, teachers, and other family and community members—work together to encourage and support them. It is vital for parents and teachers to communicate effectively with one another. Each has a piece of the picture of a child’s development, and each can be more effective when information is shared. Constant communication helps ensure that both schools and homes are responsive to students’ unique needs and therefore support children’s overall development. There are three benefits that this innovative feature will produce for the families we serve.

First, ensuring that students have a reliable adult in the building with consistent meetings will ensure that students get the right support at the right time. Secondly, we will create a line of communication between the school and the families via mentors. Lastly, mentoring will help students develop Habits of Success for their social and emotional development. All three benefits will lead to a more equitable environment for all. In this pursuit, we will increase academic achievement, develop healthy SEL in students, and reduce the attrition rate in our proposed community.

Community Service and Expeditionary Learning Weeks

Invictus Nashville proposes a school that serves students successfully by grounding them deeply in their communities. We know that students who are connected to their communities—both in school and beyond—are more motivated to meaningfully contribute to those communities. We will ground the Invictus experience in collective responsibility in a way that builds in the belief that we learn best in collaboration and that success is most worth celebrating when that success is shared amongst our community. One way we will accomplish making this belief an actionable part of our school identity is through our community service and expeditionary learning weeks.

Schools should be of the communities they serve. Part of being “of” the community means being a school that represents the diversity of the community. Our mission at Invictus Nashville in supporting students to engage with their communities begins with being of that community—creating an environment that exposes students and families to difference and celebrates the value of that difference through our curriculum as well as our community service efforts. Every K–8 student will have several opportunities throughout the year to participate in community service.

Our expeditionary learning week will happen every seventh week of each quarter. During this time, students are able to explore a wide variety of topics, such as visual arts, graphic design, film production, engineering, entrepreneurship, and external internships. The topics will be determined based on community partnerships and student interest. Students are immersed in new situations that expand their

imagination of possible career paths. Expeditionary learning is critical for a student to reflect on their sense of purpose, and ultimately develop concrete next steps.

Through these experiences, all K–8 students will develop a heart for service and pride in their community. It is our hope that these features will ensure that families want to stay connected to said community. Ultimately, we want to lower the attrition rate with a high-performing school and unique features.

Diverse by Design

The achievement gap narrowed in the 1980s under court-ordered desegregation. A return to unitary status in subsequent decades has resulted in resegregation and widening of gaps in schools across the country and in Nashville. Abundant research over the decades since *Brown v. Board of Education* demonstrates that students receive many academic and cognitive, as well as civic and social-emotional benefits by attending socioeconomically and racially diverse schools, regardless of a student’s own race or economic status. For example, the Century Foundation offers the following list of benefits for students in integrated schools:

1. Higher average test scores
2. More likely to enroll in college
3. Greater preparedness for the global economy
4. Increased leadership skills
5. Reduced racial bias
6. Increased likelihood of seeking out integrated settings later in life⁶⁴

Our diverse by design school model aims to achieve racial, cultural, linguistic, and socioeconomic diversity that reflects our proposed community, which will prepare students to thrive in our increasingly interconnected world. Additionally, since heterogeneous peer groups improve performance of low achievers without negatively impacting high achievers, this is a model that benefits all students. Invictus Nashville will highlight the natural diversity of our proposed school and infuse that diversity in the school through our key design elements. These elements will provide a unique educational experience that will boost student achievement, reduce racial bias, and strengthen our community.

Project Based Learning Curriculum

Our PBL curriculum is designed to provide equitable learning opportunities to address many types of learner variability, with flexibility in learning content, processes, and products providing all students with appropriate access to the curriculum and the chance to achieve individualized learning targets. Many studies have compared learning outcomes for students taught with a traditional approach versus PBL and found the following benefits for students:

- ◆ Increased long-term retention of content
- ◆ Improved academic performance on high-stakes tests
- ◆ Improved problem-solving and collaboration skills
- ◆ Improved student attitudes toward learning

64 Lucas, Mary Jane, "Academic Resource and Social Emotional Advisory Period: Promoting Communities of Care and an Equitable Learning Environment" (2022). *USF Tampa Graduate Theses and Dissertations*. <https://digitalcommons.usf.edu/etd/9401>

The research supports our view that academic performance on high-stakes tests must not come at the expense of, and in fact benefits from, a balanced and purposeful curriculum. Our unique model allows us to provide every student with an enriched curriculum that emphasizes experiential and project-based learning (PBL). PBL is a rigorous method where students are challenged to think critically and work collaboratively to discover solutions to questions grounded in complex, real-world scenarios. Students with special needs including English learners, students with disabilities, and gifted students will thus participate more equitably in learning activities that are easily adapted to meet individual needs.

Collaboration with community organizations in identifying and engaging with challenges in the community will add to the engagement and motivation of our PBL approach.

1.2.F. Existing Operator/Difference from Current Community Served

Not applicable, Invictus Nashville is not an existing operator.

1.2.G. Enrollment Summary and Anticipated Demographics Charts

Table 10

Number of Students

GRADE LEVEL	YEAR 1 2024	YEAR 2 2025	YEAR 3 2026	YEAR 4 2027	YEAR 5 2028	AT CAPACITY 2031
K	*72	72	72	72	72	72
1	72	72	72	72	72	72
2		72	72	72	72	72
3			72	72	72	72
4				72	72	72
5					72	72
6						120
7						120
8						120
Totals	144	216	288	360	432	792

**The figure of 72 students per grade level in K–5 reflects three classes with 24 students and two teachers each. At the transition to Middle School (grades 6–8, there is an entrance opportunity for an additional group of approximately 48 students to achieve 120 at each grade level.*

Table 11**Anticipated Demographics**

	BLACK	HISPANIC	WHITE	ASIAN + PI	ECON DIS	SP ED	ELL
Invictus Nashville Targets**	30%	30%	30%	10%	40%	14%	18%

**Reproduced from above*

1.3. Academic Focus and Plan

In this section:

- Describe the academic focus of the proposed school.
- Outline the academic plan of the proposed school. Include specific academic benchmarks.
- Describe the most important characteristics of the academic plan, including any specific educational philosophy, instructional methods, or innovations.
- Describe current research supporting the academic plan and how the plan will drive academic improvement for all students and help close achievement gaps.
- Describe the curriculum and basic learning environment (e.g., classroom-based, independent study), including class size and structure for all divisions (elementary, middle, high school) to be served, and explain any differences among the divisions.
- Explain why the instructional methods and proposed curriculum are well-suited for the targeted student population. How does the curriculum honor and/or reflect the diverse identities of your students?
- Explain how the academic plan aligns with Tennessee’s academic standards.
- If your academic plan includes blended learning, describe (x) which blended learning model the proposed school will use (i.e., online content in various lessons only, a single course, or an entire curriculum), (y) the role of teachers within the blended learning environment, and (z) how this approach will drive academic gains and close the achievement gap with the targeted population of students, using the latest data analyses and research.
- For sponsors of existing schools only: describe any key academic plan features for the proposed school that will differ from the existing school’s original application, the rationale for implementing these different features and any new resources they would require. If no key academic plan features will differ, please respond with N/A to this section.

1.3.A. Academic Focus of proposed school

The school’s academic focus aligns with the school’s mission and vision by ensuring that students are actively engaged in their academic journey. It is our mission to support our students in finding their unique path to professional and personal freedom. The curriculum helps them explore and engage in this process. As introduced in **Section 1.1**, the academic focus and distinctive features of the school are based on research that supports its effectiveness based on the developmental level of the students. In elementary school, the Montessori curriculum with uninterrupted work cycles has over a hundred years of proven success and encourages creativity and student choice. In middle school, the Project Based Learning approach is grounded in real world applications that support student autonomy and executive functioning. Each of these key components of our academic focus are explained below and the curriculum and instructional methods are detailed in full in the following sections.

Elementary (K–5)—Montessori Curriculum

We will offer a personalized learning model that is both rigorous and backed by research. Dr. Montessori developed her approach while working with marginalized student populations. This approach was based on extensive empirical observation. She was able to identify what she coined “sensitive periods” that characterize the planes of child development. This led her to develop tactile manipulatives or “works” that engage children’s concentration on the work of their development. Dr. Montessori’s research concluded that young children are capable of intense concentration and repeated practice. This is what Dr. Montessori calls “normalization.” Normalization is when their work is responsive to their planes of development.⁶⁵ The Montessori features multi-age, heterogeneous environments characterized by freedom within structure. The curriculum is designed to present engaging, carefully designed, multi-sensory materials that lead “from the hand to the mind.” This type of environment will 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.⁵⁷ Attention to details are a top priority for all Montessori teachers. They 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.⁶⁶

Teachers will observe student work, make needed adjustments for everyone’s plan, but avoid interference in “the moment of self-development.” These are times of concentration when children are doing the mental work they must do to learn. This is one of the reasons that Dr. Montessori designed self-correcting materials, which make mistakes self-evident. This allows the student to practice independently and participate in productive struggle with problems while also getting immediate feedback to prevent habituation of error without immediate teacher intervention. 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.⁶⁶

⁶⁵ Montessori’s observations of planes of development were contemporary with, or slightly 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.’

⁶⁶ Nardo, B. (2021). *Libertas School of Memphis Application of ASD to apply for Tennessee Charter Commission*.

Table 12**Elementary Curriculum Model**

GRADE LEVEL	SUBJECTS TAUGHT
K	Math, Language, Practical Life, Sensorial, and Cultural Subjects (which includes geography, music, and art)
1st–3rd	<u>Lower Elementary</u> Science—The Universe and Evolution, History English, Math
4th–5th	<u>Upper Elementary</u> Science—The Universe and Evolution, History, English, Math

**Since the founding of the school will not have a pre-K to 3rd grade or pre-K to 4th grade, Invictus will have stand-alone kindergarten classrooms*

In addition, as a BES fellow, the Founder of Invictus Nashville was able to complete 4 different month-long residencies at high performing schools with similar models. The first residency was with Libertas School of Memphis. Libertas is a Level 5 charter school that performs highly in the state of Tennessee. The learnings from this school have directly influenced Invictus Nashville’s elementary model. The high performance of Libertas School of Memphis and their lessons learned has led to our adoption of the supplemental curriculum needed for the elementary setting. These learnings are described below.

Libertas determined that while reading is a strength in the Montessori Curriculum the TNReady expectations for writing are stringent and students lack the stamina to complete tasks. Therefore, they utilized TN writing rubrics to create more frequent writing instruction and practice opportunities for students embedded within their time for CKLA and seminar. In addition, Math at Libertas is primarily taught through individualized Montessori lessons that develop conceptual understanding and procedural fluency. However, students scored lower on real-world application problems. To increase student proficiency in this area, math meetings, snapshots, and seminar classes were added.⁶⁶

These supplemental curriculums can be found in **Table 13** below with more rationale details.

Table 13**Supplemental Curriculum—Libertas Learnings**

ADDITIONAL INSTRUCTIONAL	RATIONALE
Core Knowledge Language Arts (CKLA) (grades K–5)	Complements the Montessori Curriculum—provides rich background knowledge and vocabulary through daily interactive read alouds.
TN writing rubrics (starting in second grade)	Used to create more frequent writing instruction and practice opportunities for students (daily writing in response to reading content), embedded within our time for CKLA and seminar (see below); implemented training and ongoing professional development sessions for teachers to analyze student work samples and help think about how to adjust for the following week; and tracked and reported on these data internally through our data dashboard.
Math Meetings (3 rd grade)	Teachers walk this subgroup of students through practice problems.
Math seminar classes (4 th and 5 th)	Fourth and fifth grade students now spend one hour every day in each of a separate grade-level math and ELA class, which ensure coverage of TN standards in these grades, while also preparing students for the format of middle school learning
Math Snapshots (3 rd –5 th grade)	Help teachers monitor student growth not only on individual lesson sequences but also toward grade level standards. These quizzes will occur based on the scope and sequence in math

Middle School (6–8)—Project Based Learning Approach

Our current PBL approach references the projects produced in the Summit Learning Model. This model was chosen because it will allow students to continue the autonomy, they developed in the Montessori curriculum and the curriculum centers largely around projects that relate to the real world. This exposure to the real-world and student choice is directly aligned with our mission to help students find their unique path to personal and professional freedom. During a project, students connect what they are learning to life beyond the classroom, sparking curiosity and enthusiasm for their lessons. Whether they are working on projects individually or together with peers, students learn and refine skills, such as working with a team, interpreting data, or presenting a persuasive argument. At the end of every project, students share what they've learned. They can do this through essays, presentations, lively structured debates, or other creative ways that relate to the specific project.

The Summit PBL model allows students to collaborate on the project while teachers oversee their progress and give feedback along the way. When teachers see the opportunity for deeper learning or to help students who fall off course, they use class time to work with students individually or in small groups to provide specific support. This is very similar to the design of the Montessori lessons in the elementary setting. With projects, students are learning both the subject matter and how to direct their own progress toward their end goal for the project. For example, instead of reading data from a fictional class survey to learn and practice two-way data tables, students will instead conduct their own class and community surveys to produce data to work with while mastering these skills. Grounding academic

learning in real world application increases student prior knowledge and motivation to learn more, but it also makes mastered content turn into long term cognition because of the novelty of the learning.

We believe that a rich and rigorous Project Based Learning curriculum is the best way to prepare students for the unknown challenges and new careers of the future. Our projects will assess cognitive skills that are aligned to the Tennessee State Standards. They will encourage students to engage in deep inquiry and applied problem solving as they develop academic knowledge, 21st-century skills, and personal leadership characteristics that ensure they are ready for high school, college, and beyond. The ability to follow their interests will increase student motivation, and flexibility in learning content, processes, and products will ensure that all students are able to equitably access and engage with our curriculum.

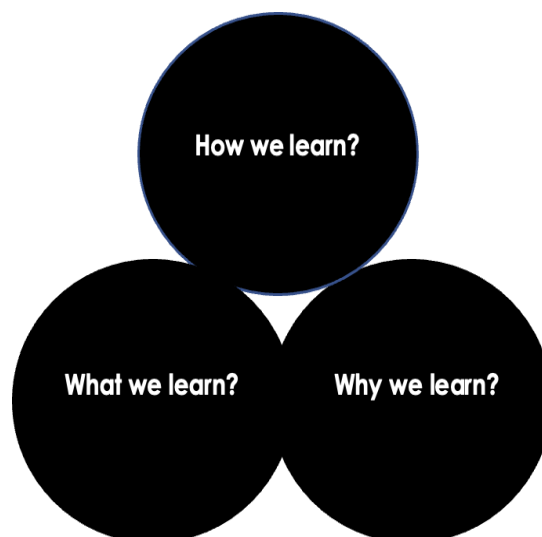
1.3.B. Academic Plan and Benchmarks

Academic Plan

The Invictus Nashville Academic Plan supports the school's academic focus through grounding in progressive educational philosophy and developmental psychology, an intentional exploration and internalizing of the Tennessee Academic Standards, research-vetted curriculum programs and instructional strategies, and learning materials that are relevant to ensure students will meet our Academic Performance Goals. **Figure 5** provides a visual representation of the outline of our academic plan. We understand that our holistic academic plan is ambitious, and we believe this ambition is necessary to meet the needs and desires of the Hermitage, Donelson, and Old Hickory communities. This section addresses how each component of our academic plan works together to achieve our mission and academic goals.

Figure 5

Invictus Nashville Academic Model



The overall model of how the components of Invictus Nashville’s academic plan work together can best be understood through answering three questions:

1. What will we learn?
2. How will we learn?
3. Why will we learn?

The questions are answered in detail below.

How We Will Learn

Mastery will occur through two primary educational philosophies and models: The Montessori Curriculum in elementary school (K–5) and Project Based Learning in middle school (6–8). Our instructional methods will blend the ethos of progressive, child-centered Montessori, Reggio, and Project Based Learning educational approaches with best practices for promoting equitable outcomes for all students, including students with special needs and ELLs. It was an intentional decision to switch from the Montessori Curriculum in elementary school to a Project Based Curriculum in middle school. We believe that the Montessori curriculum helps students begin to develop the autonomy they will need to “identify their unique path to professional and personal freedom.” We believe that switching to a PBL curriculum in middle school will complement those skills while adding more real-world applicable experiences. In addition, the switch to PBL will better prepare students for a more traditional school environment as they prepare for high school.

The transition from the elementary curriculum to the middle school curriculum will be a smooth process. Starting in the fifth grade, students will have a slightly different experience during their afternoon work block. This will include exposure to project-based learning by completing a project using the Summit Learning Platform and more traditional prep for TNReady assessments. In addition, Fourth and fifth grade students will spend one hour every day in each of a separate grade-level math and English language arts class, which ensure coverage of TN standards in these grades, while also preparing students for the format of middle school learning. The curriculum will be the only change for students; therefore, they will continue to have support from their mentor as well.

What We Will Learn

Our curriculum selections were made after researching the curricular resources that are highly vetted and research backed and would also support student mastery of Tennessee State Learning Standards. These learning standards serve as the baseline guidance of our academic programming. We know that it is imperative that students demonstrate mastery on TNReady assessments at the end of each grade level, so we have designed an academic plan and model that prepares them to demonstrate that mastery. This is accomplished through strong curricular materials, tailoring materials to ensure alignment to mastery of state standards, robust opportunities for assessment, and planning for remediation or extension from the data collected from those assessments. We know that it is a reality that some students will enroll at Invictus Nashville who are below grade level upon enrollment for a variety of reasons. Each student will complete a universal screener to determine their tier placement for RTI interventions at the beginning of each year. The uninterrupted work blocks and two teacher model is ideal for small group intervention. Therefore, students will receive RTI² support during either the morning or afternoon work cycles in elementary school. This will be determined based on student numbers and identification of their tiers. In the middle school setting, RTI² support will be provided as a separate block every day for all students. **Section 1.4.D** gives details on how our RTI² program will support those students in both filling in critical skill and content gaps while driving towards grade-level mastery.

Why We Will Learn

Student motivation to learn will be key to our success at Invictus Nashville, and our design has given considerable thought and priority to inspiring student motivation through mentoring, peer collaboration, and giving opportunities for students to serve and learn from their community. Students will be better able to navigate to a quickly changing and diversifying 21st-century society. Further, students will be grounded in their educational experience at Invictus Nashville by the understanding that they are developing authentic character and values through the Habits of Success. They will be challenged to reflect on who they have been, who they are, and who they want to be, always understanding that character development and acting in congruence with their values is not a destination, but rather a continual process of growth. Students will know they are working towards living in the process of self-actualization, part of which is coming to an understanding of who the potential version of themselves is that they want to become. Each of these “whys” will prepare students for success in their high school and post-secondary opportunities of their choice.

Academic Benchmarks

Our instructional goals are guided by TN Academic Standards, and our primary metric of achievement and growth will be EOY TNReady assessments for each grade level starting in Grade 3. The following section of this application, **Section 1.4** explains the academic benchmarks of Invictus Nashville in greater detail and shows our approach to monitoring and achieving those goals. In general, regular benchmark assessments serve as guideposts to ensure that students are on track to master instructional goals each year. Students will participate in the NWEA MAP Assessments to measure growth throughout the year. These benchmark opportunities will give our leadership and instructional teams a chance to assess student learning, adjust the instructional plan, tailor more specific individualized supports for students, and adjust our RTI² programming to further meet student academic needs. Mentoring will also be leveraged to collect data. The goal of data collection and assessment of student learning will be that there are never surprises in results. Our classroom questioning, daily exit tickets, unit assessments, and PBL modules will be aligned to Tennessee State Learning Standards and assessments. Therefore, we will consistently have a pulse on where student mastery has a student in progress towards EOY mastery of grade level content.

1.3.C. Educational Philosophy

The educational philosophy of Invictus Nashville is informed by the work and teachings of progressive educators including John Dewey and Maria Montessori, as well as developmental psychologists Abraham Maslow, Lev Vygotsky, and Jean Piaget. Together these teachings have led the founders of Invictus Nashville to a vision for an innovative public school where a diverse community of Nashville families are inspired and empowered to learn together and work hard to construct a better tomorrow for our local and global communities. We believe that education must be an active and constructive process, where students are continuously challenged in their zone of proximal development and the adults who support students engage in their own ongoing human development work. We believe in developing students with creative and innovative minds capable of discovery and capable of doing new things, not only learning what is already known or repeating what other generations have done. Simply stated, we are aligned with John Dewey in our belief that “Education is not preparation for life; education is life itself,” and we have developed a purposeful, meaningful, impactful, well-rounded academic program that reflects this philosophy.

1.3.D. Research Supporting the Effectiveness of the Academic Plan

Research on the effectiveness of each component of our academic plan is woven into the narrative of our mission and vision and academic plan throughout this application. More support for the effectiveness of each component is offered in this section.

Elementary (K–5)—Montessori Curriculum

The elementary academic program is rooted in the use of the Montessori curriculum and methodology. When implemented with high fidelity, the Montessori method has been shown to close the opportunity gap by yielding positive academic and developmental outcomes.⁵⁷ The unique Montessori approach contributes to positive academic and development outcomes. Teachers must undergo extensive training in the Montessori method to shape the curriculum to meet the needs of each student, and school personnel at all levels must commit to an educational environment that profoundly respects the developmental needs of children. Multi-age groupings help teachers respond to each student's natural pace of development, provide leadership opportunities, create a diverse environment, and promote a growth mindset.⁵⁸ In addition, the benefits of a prepared learning environment are higher math and science performance, improved English fluency, increased engagement, and joy in learning.⁵⁹ The prepared environment enhances educational opportunities because it allows each child to develop freely at his own pace".⁶⁰ The teachers at Invictus Nashville will spend time each day making structured observations of the children at work and will use their observations to determine when each child is ready for a new lesson or whether they need to spend more time on current work. This meticulous record-keeping on student academic performance and using one-on-one mentoring will ensure that each child's progress is continuously supported.

There are two reasons that the Montessori curriculum will meet the needs of our target population. First, our target area is diverse, and the area has seen an increase in the number of students who have limited English Proficiency.² Please see **Section 1.2** for more details on our target enrollment demographics.

Students can learn individually or in small groups using the Montessori curriculum and two-teacher model support. The exercises are chosen not only for curriculum reasons but for their ability to engage the students. The materials allow students to work independently of the teacher.⁶⁷ This model allows great diversity of work going on at any one time which leads to customization and modifications to increase student learning. The Sheltered Instruction Observation Protocol (SIOP) model recommends best practices such as small group instruction and building background.⁶⁸ These practices happen daily in a Montessori classroom. The diversity of our target population is further supported by the Montessori model. Diversity is embedded into the fabric of the Montessori learning environment. "This type of curriculum, one that begins with the overall picture and delves down into the details, helps students understand that diversity underpins our existence. To truly respect and value diversity, students must not only explore it through their academic studies but live with it in their everyday, classroom social interactions."⁵⁸

Middle School (6–8)—Project- Based Learning

There were two new randomized, controlled studies conducted that involved over 6,000 students in 114 schools across the country. Over half of the participants came from low-income households. The result of these studies showed that students in PBL models significantly outperformed students in traditional

67 Gere, P. (2022). *Diversity series: How the Montessori approach enriches learning*. Diversity Series: How the Montessori Approach Enriches Learning. Retrieved January 14, 2023, from <https://www.ourkids.net/school/diversity-series-montessori-classroom>

68 *Sheltered Instruction Observation Protocol*. SIOP—learn about SIOP. (n.d.). Retrieved January 14, 2023, from <https://www.cal.org/siop/about/>

curricular models with raised academic performance across a variety of grade levels, socioeconomic subgroups, and reading ability.⁶⁹⁻⁷⁰ In an elementary science study that included 62% of students qualifying for free or reduced lunch and 58% students of color, students who were in a PBL model classroom outscored students in traditionally taught classrooms by eight percentage points on science exams, and this outperformance was consistent across reading levels.⁶¹

Researchers conclude that these results were in part due to the connection students were able to make between their learning and their real lives, suggesting that pairing a project-based model with real world application would increase that relevance even more.⁶⁰ The results from the research women into this application inform our academic plan and support the effectiveness of project-based learning with real world application.

Project-Based Learning in the middle school supports the diversity and rising English Language Learners. PBL involves learner-centered questions driven by student inquiry not by teacher-driven exploration. It is not about adding something new but rather delving deeper into a topic, asking hard questions, and allowing time to pursue multiple answers.⁷¹ Student autonomy and real-world application will be helpful for students as they understand their own identity and that of their peers. The rising English Language Learners will benefit as well, “PBL is for students who speak a language other than English and want their voice to be a part of important discussions. PBL is for students who have learning disabilities and want to collaborate with their typical peers. PBL is for students of every color, ethnicity, or religion who want to lift the topics that are important to them. PBL is for every student who wants to learn more about others and with others in a way that is relevant to themselves and their community.”⁶²

Expedition Learning Week (K–8)

This week is an integral part of our model for both students and teachers. Students will participate in Expedition Learning Weeks every seventh week of each quarter. This week is directly aligned to our mission which is “to help each student find their unique path to personal and professional success” and “to help students develop a heart for service.” This week is directly aligned to that mission by helping students see the possibilities for their future and participate in community service. There is another benefit to our expedition week. Students will step-back from our schedule and will receive intervention based on their needs from the first six weeks of school. The Invictus Nashville teachers will receive professional development and be allowed time to analyze data to plan for the end of the quarter as well. The heart of Invictus Nashville is the community. This week will rely heavily on community partnerships. We want students to see themselves in all roles and professions and we also want them to stay connected to their community. We will partner with community leaders who want to expose their trades and craft to students. More details will be explained in **Section 2.5**.

1.3.E. Curriculum and Learning Environment

The Kindergarten Curriculum

Based on the Montessori bands, the kindergarten curriculum is different from the rest of the elementary curriculum. This curriculum includes math, language, practical life, sensorial and cultural subjects (including world geography, music, art, and more). The Practical Life and Sensorial lay critical foundations

69 Okuo, Oremeyi. (2014). Montessori Education And The 'Prepared Environment'.

70 Saavedra, Anna, et al. USC Dornsife: Center for Economic and Social Research, Los Angeles, CA, 2021, pp. 2–39, Knowledge in Action Efficacy Study Over Two Years.

71 Maslyk, J. (n.d.). *Equity, diversity, and inclusion: Ensuring PBL for all*. Equity, Diversity, and Inclusion: Ensuring PBL for All. Retrieved January 15, 2023, from <https://blog.definedlearning.com/equity-and-access-to-pbl#:~:text=Project%2Dbased%20learning%20can%20remove,their%20personal%20strengths%20and%20interests>

for academic and soft skills, developing students' executive functions (such as working memory, self-control, and sequencing) and introducing concepts of size, shape, order, and classification that are foundational to mathematics and the sciences. Kindergartners will have work plans to support them in choosing work should they have difficulty doing so.

- ◆ In the **mathematics curriculum**, children develop number sense, number relationships, decimal place value, and operations. Children learn foundational skills needed to successfully learn measurement and data, geometry, and algebra. Anytime we introduce mathematical concepts to a child utilizing the mathematics curriculum, the child learns concepts from concrete to abstract.
- ◆ The Montessori **language curriculum** covers the domains of listening and speaking, reading, and writing. Children develop their receptive language, comprehension, expressive language, and social communication skills through listening and speaking. There is also a strong emphasis on vocabulary development and broad background knowledge. In reading, the curriculum focuses on early reading, comprehension, print concepts, fluency, letter recognition, and phonological awareness. In writing, children learn about the writing process, writing application, and composition.
- ◆ The **practical life** area focuses on supporting children to develop the skills needed to care for themselves and their classroom environments. In practical life, children develop concentration skills, build their independence, increase their responsibility, learn how to follow through with a process from beginning to end, and strengthen their fine motor skills. The Montessori Practical Life curriculum also provides opportunities for children to understand their personal development and health. Lessons of Grace and Courtesy are taught to support children in developing appropriate behaviors and manners.
- ◆ The **sensorial curriculum** involves hands-on, manipulative materials and addresses the refinement of all the senses, supporting children in becoming more and more able to discern fine gradations based on color, size, length, shape, etc. This curriculum also helps build the concepts and skills of categorization, pattern, sequence, matching, and grading.
- ◆ **Cultural studies** include science, social studies, and the creative arts. Scientific studies include biology and earth science, focusing on plants and animals. Geography studies begin with the earth as a whole and move to continents, countries, and US states. World cultures are introduced through pictures, stories, and objects, highlighting all human groups' commonalities. The creative arts are an integral part of the learning process and the learning environment.

Lower and Upper Elementary Curriculum

The first through fifth grade curriculum is divided into different bands. The lower elementary curriculum is for first to third grade and upper elementary is for fourth to fifth grade, but we will only use it for fourth and fifth grade. The curriculum for this age group is also developmentally appropriate and is rooted in providing each child with a basic knowledge of what Maria Montessori called a cosmic education.⁷² Cosmic education aims to help each child understand the evolving universe, their place in it, and how interconnected everything and everyone is. Cosmic education is delivered utilizing five stories that introduce and form the foundation of the Math, Language, Science, and History curricula. Each of the five stories is followed by a detailed, highly structured series of lessons to teach the key concepts and skills in each curriculum area. Please see the descriptions below.

⁷² Lillard, A., & Else-Quest, N. (2006). Evaluating Montessori education. *Science*, 313(5795), 1893–1894.

- ◆ **Story of the Coming of the Universe (Science):** This story explores the origins of our universe, our solar system, and planet earth and is science focused. The curriculum covers physics, astronomy, geology, physical geography, and chemistry.
- ◆ **Story of Life (Science):** The curriculum aligned to the Story of Life is focused on the evolutionary timeline of life, including chemistry, zoology, botany, nutrition, classification of living things, care and requirements of different animals, and their connectedness within an ecological system.
- ◆ **Story of Humans (History):** The Story of Humans introduces the emergence of the human species in the timeline of life and the academic domains of social studies. Children learn about prehistory and the emergence of ancient civilizations. The Story of Humans provides a foundation of understanding that the social studies standards for the elementary grades gradually build upon.
- ◆ **Story of Language (English):** The Story of Language is the basis of the language curriculum. The curriculum covers the development of reading and writing fluency and comprehension and the fundamentals of grammar. This story shows the progression of how writing was developed to its role in our current society.
- ◆ **Story of Signs and Symbols (Math):** The math curriculum is introduced by the Story of Signs and Symbols. The math curriculum covers arithmetic, geometry, and algebra in a comprehensive and systematic progression of concepts and skills based on manipulating concrete materials at every step.

In middle school (6–8), our PBL model will lead to deeper cognition and longer-term mastery of state learning targets because of the flexibility and nuance required to apply learning to real world contexts. Invictus’ PBL modules will stretch student thinking across contents while simultaneously offering a greater variety of access points that ensures planning for diverse learners.⁷³ Layering on opportunities for community service and expeditionary learning weeks with our PBL model will ensure that students connect their classroom learning to community impact, as well as offering real world opportunities for SEL and character development growth. Each of these models, and our SEL instruction, will be supported by one-to-one weekly mentoring. We will ensure that each student has intensive individualized support through our weekly one-to-one mentoring.

The academic and character development through mentoring will be a data-driven instructional strategy in which teachers are continuously identifying students who are on the cusp of independent learning and mastery, filling in those gaps just in time, and tracking their classroom and assessment data to ensure the skills developed through mentoring are transferable. The project-based curriculum that has been selected comes from the Summit Learning model. Please see **Table 14** for the outline and rationale for the selection.

⁷³ Krajcik, Joseph, et al. Michigan State University, East Lansing, Michigan, 2021, pp. 2–70, Assessing the Effect of Project-Based Learning on Science Learning in Elementary Schools.

Table 14**Summit Learning Project Based Learning Model**

GRADE LEVEL	SUBJECT	DETAILS+RATIONALE
6–8	Math	Kendall Hunt’s Illustrative Math curriculum provides open-source student and teacher materials that focus on conceptual understanding of mathematical concepts that prepare students for higher order application tasks. Curriculum resources from PBLWorks will supplement the KHIM curriculum during the Math PBL module.
	History	The C3 Framework, like the Tennessee State Standards emphasizes the acquisition and application of knowledge to prepare students for college, career, and civic life. It intentionally envisions social studies instruction as an inquiry arc of interlocking and mutually reinforcing elements that speak to the intersection of ideas and learners. The Four Dimensions highlighted below center on the use of questions to spark curiosity, guide instruction, deepen investigations, acquire rigorous content, and apply knowledge and ideas in real world settings to become active and engaged citizens in the 21 st century. ⁷⁴
	Grade 6—Ancient Civilization	
	Grade 7—Medieval History	
	Grade 8—US History	
Science	Open SciEd provides a solid base open-source curriculum that we will work to re-sequence to be aligned to the Tennessee Academic Standards for middle grades science. We will also heavily supplement our science curriculums with the PBLWorks modules, both during and not during the Science PBL module.	
English	Projects aligned to Tennessee Academic Standards culminating in a final product that is scored on cognitive skills.	

Learning Environment

The learning environment for the elementary setting follows the physical design of Dr. Maria Montessori. Montessori classrooms typically have two adults (a lead teacher and an assistant teacher) In a Montessori class students learn from each other and their independent work with the didactic materials. Children are inspired to extend their learning by the rich variety of activities their classmates are engaged in at any given time. In alignment with the Montessori method, our elementary classes will build student and community independence in our learning environment.

In the **elementary school** (K–5), a key element of Montessori education implemented at Invictus will be the structure of the school day in extended work cycles. Students will participate in daily work cycles of

⁷⁴ National Council for Social Studies . (2022). *College, career, and Civic Life (C3) framework for Social Studies State Standards*. Social Studies. Retrieved January 18, 2023, from <https://www.socialstudies.org/standards/c3>

between two and three hours, one in the morning and one in the afternoon. The work cycles will be led by the two classroom teachers (one lead and one assistant).

An important element of Invictus work cycles is the four freedoms that help our students develop independence, intrinsic motivation, and confidence as leaders of their own learning:

1. Freedom to choose where to work.
2. Freedom to choose how long to work on each task.
3. Freedom to choose who to work with.
4. Freedom to choose what order to do their work in.

These four freedoms are automatically given to students unless they demonstrate that they need additional support or structure. For example, a student who has trouble completing all work may receive a list of tasks to follow in order and may have an assigned workspace. At Invictus, we will incorporate more structure and direct instruction, and students will engage in daily whole group, small group, and individual instruction guided by our proposed curriculum. Assistant teachers will provide support and interventions to address needs as indicated by academic benchmarks. In each work cycle an observer could expect to see the following instructional elements:

- ♦ **Launch:** The work cycle Launch is a whole group activity led by the lead or the assistant may involve an interactive read aloud, introduction of a mathematics performance task, or a lesson on how to use a set of classroom materials in tackling a component of one of our multidisciplinary projects.
- ♦ **Independent Work:** Following the Launch, all students proceed to Independent Work time where they will progress through a daily plan of learning activities during that work cycle. As explained earlier, if students have demonstrated that they can independently finish their daily agenda, they enjoy the four freedoms during the work cycle. Independent Work will be monitored and guided as needed by one of the classroom teachers.
- ♦ **Focused Instruction:** During Independent Work, students will be called for individual or small-group Focused Instruction in Math or Literacy. These sessions will be 10–30 minutes in length, allowing for approximately four to eight Focused Instruction lessons per day in each work cycle. Based on the strengths of the teachers.

The learning environment for middle school will be similar. The English and ELA classes will have a dedicated teacher and assistant teacher. However, the science and history classes will have a rotating assistant teacher who will focus primarily on pushing into classrooms to support students who perform below grade level with small group instruction as prescribed by the lead teacher and school testing data.

1.3.F. Instructional Methods, Curriculum, and Target Community

Curriculum and Target Community

The uninterrupted work cycles of Dr. Maria Montessori and project-based curriculum inherently honors the diverse identities of students because it is grounded in the local identity of their communities. The instructional strategy of layering in real world application into the research-based curriculum grants opportunities for students to see themselves in their studies as well as see the impact they can immediately have on their communities. Each curriculum that we have selected has a demonstrated success of achievement when implemented in diverse populations, and this was a key factor in the curriculum selected for Invictus Nashville. Layering in PBL modules with each curriculum increases the reflection of student identities in each course, and our community service model gives students the

opportunity to extend their learning into places they feel like experts and locals. **Section 1.2** outlines why we have selected the target community we have, and we are confident that the curricula and approaches we have selected have a demonstrated track record of success in other high performing charters that serve similar populations. In addition, we have been strategic in designing a program that adds in local context to tailor our program to the specific community we are serving.

Instructional Methods

Table 15 demotes specific instructional methods that will be used at Invictus Nashville. The table also provides insight to which grade-level will use each instructional approach. These methods have been proven to support the learning of all students. The selection of these universal methods is important based on our diverse population in our targeted area. Therefore, each instructional method could support the extension of learning for advanced students as well as the increasing special education and English language learner population in our targeted zone. For example, guided reading could pair advanced students together to read a book. These students could be required to complete a character analysis based on that reading independently or together. However, guided reading could mean that a small group of students that are not on grade level are being led through the same book by a teacher. They could complete a charter analysis using sentence stems or with the support of the teacher as a whole group.

Table 15

Invictus Nashville Instructional Strategies

LITERARY INSTRUCTIONAL METHODS	
Interactive Read Aloud (K-5)	Using CKLA—This Interactive Read Aloud is an effective strategy for whole-group literacy instruction, and can also be an engaging manner for introducing topics in other content areas through narrative or nonfiction texts. The teacher reads from an engaging text and periodically prompts students to turn and talk to each other about their thinking as they listen to the story. The teacher models important skills or understandings that the students will explore and practice independently after the Interactive Read Aloud.
Guided Reading (K-8)	Benchmark Assessments inform student grouping by instructional level or target skill. While reading a common book at an appropriate level, guided reading groups will meet regularly with the teacher to complete activities relating to phonics, comprehension, features of the text, and word study.
Writing Workshops (2 -8)	The Writing Workshop is a student-centered approach to process writing in which students spend extended periods of time working on process pieces from different writing genres. With support from the teacher throughout the process, they have the ability to select their own topics for their writing and work together with classmates to revise and develop their work. During the writing workshop students may also engage in direct instruction and conferences on writing skills, grammar, and spelling.
Word Study (K-5)	After completing the Developmental Spelling Assessment at the beginning of the year students are grouped for instruction in phonics and spelling skills. Each week the word study group completes self-directed and collaborative activities with a targeted phonics or spelling pattern.
Collaborative Approaches to Comprehension (6-8)	Collaborative approaches are structured, discussed-based methods for joint processing of text. They can be used by a teacher with a student or group of students and are a method to scaffold student comprehension during reading. Researched methods include Peer-Assisted Learning Strategies (PALS), Reciprocal Teaching (RT), and Questioning the Author (QtA). These methods harness the instructional and motivational power of discussion and peer collaboration, while providing structured methods that are easily taught to students, and a light planning burden for teachers.

Table 15, Invictus Nashville Instructional Strategies (cont'd)

MATH INSTRUCTIONAL STRATEGIES	
Sense Making (K–8)	This approach to mathematics instruction focuses on understanding processes and strategies that lead to effective problem solving. Sense Making provides students with multiple opportunities to build and demonstrate mastery of Mathematical concepts and skills.
Guided Problem Solving (3–8)	Seminar and Math Meetings—Students work in groups with the teacher to practice specific mathematical concepts and processes.
Shared Problem Solving (K–8)	Students work together with peers to apply mathematics to solve challenging real-world problems. Collaboration with others and sharing multiple solutions allows students to build greater connections to mathematics.
Independent Math (K–8)	Students have an opportunity to independently learn and apply math concepts to solve problems.
Math Games (K–8)	Students build confidence and develop positive attitudes towards math as they apply math skills and processes to math games.

Table 15, Invictus Nashville Instructional Strategies (cont'd)

INSTRUCTIONAL STRATEGIES FOR ALL CONTENT AREAS	
Direct Instruction (K-8)	The teacher teaches, models, or demonstrates a concept or process to be explored and implemented by students.
Use of Manipulatives (K-8)	Dr. Maria Montessori affirms, "What the hand does the mind remembers." We will incorporate hands-on learning opportunities in all content areas through the use of hands-on materials including math manipulatives, Montessori literacy materials, and science experiments.

1.3.G. Invictus Nashville Academic Plan and Alignment to Tennessee Standards

Invictus will provide a rigorous curriculum in all grades and in all contents that prepares students for success in the post-secondary opportunities of their choice. The proposed Executive Director and Assistant Director will use Tennessee Academic Standards to backwards plan all units and lessons, as well as to inform all curricular and academic programming decisions. Upon approval the proposed Executive Director will begin to map the curriculum using Montessori Compass. The Montessori Compass team provides a sophisticated and comprehensive mapping tool. Developed in collaboration with Tim Seldin and the Montessori Foundation team, this mapping is the first of its kind to demonstrate how a robust Montessori Scope and Sequence maps to the defined Standards for English Language Arts and Mathematics from kindergarten through Grade 6.75

There will be ongoing conversations between Bob Nardo, the Executive Director of Libertas School of Memphis, and his Academic Dean. They have mapped the standards. Upon the hiring of the Assistant Director, they will collaborate to ensure complete alignment prior to the Summer Institute in the summer of 2024. The Project-Based learning curriculum through the Summit Model has already been mapped. The proposed Executive Director, Dr. Jones was the Assistant Director of a local charter school that implemented the model in their charter school. As the Assistant Director, she mapped the curriculum for grades 5–8 in 2018. We know that developing higher order critical thinking skills that can be applied to new, novel concepts and problems is paramount for post-secondary opportunity and success. The selected curriculum is aligned to the Tennessee State Learning Standards and will ensure mastery of grade level content in each grade and in each course. Our assessments plan, which can be found in more detail in **Section 1.7**, will also be aligned to Tennessee State Learning Standards to ensure mastery is being achieved and will allow us to plan around more rigorous support when it is not.

For reference, we have provided **sample mapping tables** for English and Mathematics for our first year of operation. The process of aligning the curriculum to the Tennessee Academic Standards is to priority and we have a more robust and comprehensive internal mapping outline with milestones for each academic year.

75 *Standard Mapping*. Montessori Compass. (n.d.). Retrieved January 15, 2023, from <https://montessoricompass.com/>

Table 16

Math Table, Kindergarten

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.CC.A.1 - Count to 100 by ones and tens	<ul style="list-style-type: none"> Montessori Hundred’s Board 	<ul style="list-style-type: none"> Identify number name and the counting sequence.
K.CC.A.2 - Count forward beginning from a given number within the known sequence (instead of having to begin at 1)	<ul style="list-style-type: none"> Montessori Hundred’s Board 	<ul style="list-style-type: none"> Identify number name and the counting sequence.
K.CC.A.3 - Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).	<ul style="list-style-type: none"> Number rods 	<ul style="list-style-type: none"> Identify number name and the counting sequence.
<p>K.CC.B.4 - Understand the relationship between numbers and quantities; connect counting to cardinality.</p> <ul style="list-style-type: none"> When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object. Understand that the last number name tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they are counted. Understand that each successive number name refers to a quantity that is one larger. 	<ul style="list-style-type: none"> Wooden hierarchical material Golden beads Large bead frame 	<ul style="list-style-type: none"> Count to tell the number of objects.

Continued on the next page.

Table 16, Math Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.CC.B.5 - Count to answer “how many?” questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1-20, count out that many objects.	<ul style="list-style-type: none"> • Base board; golden beads (units, tens) • Created, laminated word problems (or sheets of word problems in binders with page protectors) 	<ul style="list-style-type: none"> • Count to tell the number of objects.
K.CC.C.6 - Identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group, e.g., by using matching and counting strategies.	<ul style="list-style-type: none"> • Base board; golden beads (units, tens) • Created, laminated word problems (or sheets of word problems in binders with page protectors) 	<ul style="list-style-type: none"> • Compare numbers
K.CC.C.7 - Compare two numbers between 1 and 10 presented as written numerals.	<ul style="list-style-type: none"> • Wooden hierarchical material • Golden beads • Large bead frame 	<ul style="list-style-type: none"> • Compare numbers
K.OA.A.1 - Represent addition and subtraction with objects, fingers, mental images, drawings[1], sounds (e.g., claps), acting out situations, verbal explanations, expressions, equations.	<ul style="list-style-type: none"> • Number rods 	<ul style="list-style-type: none"> • Understand the concepts of addition and subtraction to 20. • Solving for an unknown • Learn the following terminology: adding to, taking from, putting together, taking apart, comparing with unknowns

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Table 16, Math Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>K.OA.A.2 - Solve addition and subtraction word problems, and add and subtract within 10, e.g., by using objects or drawings to represent the problem.</p>	<ul style="list-style-type: none"> • Base board; golden beads (units, tens) • Created, laminated word problems (or sheets of word problems in binders with page protectors). 	<ul style="list-style-type: none"> • Understand the concepts of addition and subtraction to 20 using 3 numbers. • Solving for an unknown
<p>K.OA.A.3 - Decompose numbers less than or equal to 10 into pairs in more than one way, e.g., by using objects or drawings, and record each decomposition by a drawing or equation (e.g., $5=2+3$ and $5=4+1$)</p>	<ul style="list-style-type: none"> • Manufactured: Box of colored bead bars 1-9, 20 of each bar; Golden 10's • Prepared by teacher: 2-3 sets gray number cards 0-9 ($1\frac{1}{2} \times 1\frac{3}{4}$); felt mat of appropriate size 	<ul style="list-style-type: none"> • Give experience of the Commutative Law for Multiplication. • Understand the meaning of "Commutative Law

Continued on the next page.

Table 16, Math Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>K.OA.A.4 - For any number 1 to 9, find the number that makes 10 when added to the given number, e.g., by using objects or drawings and record the answer with a drawing or equation.</p>	<ul style="list-style-type: none"> • A quantity of varying bead bars of the board stair, usually 5 of each (kept in a special box or bowl reserved for the snake game. • A black and white bead stair. • A quantity of ten bead bars (in a box) • An assortment of grey bead bars (subtraction bars) • A special notched card for the purpose of counting and marking. • Two boxes or trays; one to contain the addition bars and the other to contain the subtraction bars that have been counted. • Golden beads (units) 	<ul style="list-style-type: none"> • To familiarize children with subtraction as an unknown-addend problem

Continued on the next page.

Table 16, Math Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.NBT.A.1 - Compose and decompose numbers from 11-19 into ten ones and some further ones, e.g, by using objects or drawings, and record each composition or decomposition by a drawing or equation (such as $18=10+8$); understand that these numbers are composed of ten ones and one, two, three, four, five, six, seven, eight, or nine ones.	<ul style="list-style-type: none"> • Wooden hierarchical material • Golden beads • Large bead frame 	<ul style="list-style-type: none"> • Counting to 120. • Reading and writing numerals and represent a number of objects with a written numeral
K.MD.A.1 - Describe measurable attributes of objects such as length or weight. Describe several measurable attributes of a single object.	<ul style="list-style-type: none"> • Number rods 	<ul style="list-style-type: none"> • Comparing the length of two objects by using a third object.
K.MD.A.2 - Directly compare two objects with a measurable attribute in common, to see which object has “more of”/“less of” the attribute and describe the difference. For example, directly compare the heights of two children and describe one child as taller/shorter.	<ul style="list-style-type: none"> • Wooden hierarchical material • Paper, pencil, scissor • Paperclips 	<ul style="list-style-type: none"> • To understand that multiple copies of a shorter object express the length of a larger object. • To introduce the child to the idea of an agreement among people to use a common unit when measuring.
K.MD.C.4 - Classify objects into given categories; count the numbers of objects in each category and sort the categories by count.[2]	<ul style="list-style-type: none"> • Created, laminated Montessori material • Judy clock 	<ul style="list-style-type: none"> • Tell and write time in hours and half-hours
K.G.A.1 - Describe objects in environment using names of shapes, and describe the relative positions of these objects using terms such as above, below, besides, in front of, behind, next to.	<ul style="list-style-type: none"> • Geometric cabinet • Equivalency material 	<ul style="list-style-type: none"> • Distinguish between defining and non-defining attributes.

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Table 16, Math Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.G.A.2 - Correctly name shapes regardless of their orientations or overall size.	<ul style="list-style-type: none"> Constructive triangles Fraction material 	<ul style="list-style-type: none"> To understand that putting two or more shapes together creates a new shape.
K.G.A.3 - Identify shapes as two-dimensional (lying in a plane, "flat") or three-dimensional ("solid").	<ul style="list-style-type: none"> Fraction circles inset material, divided square metal insets, divided triangle metal insets, three boxes of constructive triangles (triangular, small hexagonal, large hexagonal) 	<ul style="list-style-type: none"> To introduce the idea of a quantity being divided into equal portions. To show that the geometric representation of the unit can be any shape or size and that the geometric shape or size of a fraction depends on the geometric shape or size of the unit.
K.G.B.4 - Analyze and compare two- and three-dimensional shapes, in different sizes and orientations, using informal language to describe their similarities, differences, parts (e.g., number of sides and vertices/ "corners") and other attributes (e.g., having sides of equal lengths).	<ul style="list-style-type: none"> Fraction circles inset material, divided square metal insets, divided triangle metal insets, three boxes of constructive triangles (triangular, small hexagonal, large hexagonal) 	<ul style="list-style-type: none"> Analyze, compare, create, and compose shapes.
K.G.B.5. Model shapes in the world by building shapes from components (e.g., sticks and clay balls) and drawing shapes.	<ul style="list-style-type: none"> Fraction circles inset material, divided square metal insets, divided triangle metal insets, three boxes of constructive triangles (triangular, small hexagonal, large hexagonal) 	<ul style="list-style-type: none"> Analyze, compare, create, and compose shapes.

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Table 16, Math Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.G.B.6 - Compose simple shapes to form larger shapes. For example, "Can you join these two triangles with full sides touching to make a rectangle?"	<ul style="list-style-type: none">• Fraction circles inset material, divided square metal insets, divided triangle metal insets, three boxes of constructive triangles (triangular, small hexagonal, large hexagonal)	<ul style="list-style-type: none">• Analyze, compare, create, and compose shapes.

Table 17

Math Table, First Grade

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>1.OA.A.1 - Use addition and subtraction within 20 to solve word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem.</p>	<ul style="list-style-type: none"> • Number rods • Base board; golden beads (units, tens) • Created, laminated word problems (or sheets of word problems in binders with page protectors) 	<ul style="list-style-type: none"> • Understand the concepts of addition and subtraction to 20. • Solving for an unknown • Learn the following terminology: adding to, taking from, putting together, taking apart, comparing with unknowns
<p>1.OA.A.2 - Solve word problems that call for addition of three whole numbers whose sum is less than or equal to 20, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem.</p>	<ul style="list-style-type: none"> • Number rods • Base board; golden beads (units, tens) • Created, laminated word problems (or sheets of word problems in binders with page protectors) 	<ul style="list-style-type: none"> • Understand the concepts of addition and subtraction to 20 using 3 numbers. • Solving for an unknown

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Table 17, Math Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>1.OA.B.3 - Apply properties of operations as strategies to add and subtract.2Examples: If $8 + 3 = 11$ is known, then $3 + 8 = 11$ is also known. (Commutative property of addition.) To add $2 + 6 + 4$, the second two numbers can be added to make a ten, so $2 + 6 + 4 = 2 + 10 = 12$. (Associative property of addition.)</p>	<ul style="list-style-type: none"> • Manufactured: Box of colored bead bars 1-9, 20 of each bar; Golden 10's • Prepared by teacher: 2-3 sets gray number cards 0-9 ($1\frac{1}{2} \times 1\frac{3}{4}$); felt mat of appropriate size 	<ul style="list-style-type: none"> • Give experience of the Commutative Law for Multiplication. • Understand the meaning of "Commutative Law
<p>1.OA.B.4 - Understand subtraction as an unknown-addend problem. For example, subtract $10 - 8$ by finding the number that makes 10 when added to 8.</p>	<ul style="list-style-type: none"> • A quantity of varying bead bars of the board stair, usually 5 of each (kept in a special box or bowl reserved for the snake game. • A black and white bead stair. • A quantity of ten bead bars (in a box) • An assortment of grey bead bars (subtraction bars) • A special notched card for the purpose of counting and marking. • Two boxes or trays; one to contain the addition bars and the other to contain the subtraction bars that have been counted. • Golden beads (units) 	<ul style="list-style-type: none"> • To familiarize children with subtraction as an unknown-addend problem

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Table 17, Math Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>1.OA.C.5 - Relate counting to addition and subtraction (e.g., by counting on 2 to add 2).</p>	<ul style="list-style-type: none"> • A quantity of varying bead bars of the board stair, usually 5 of each (kept in a special box or bowl reserved for the snake game. • A black and white bead stair. • A quantity of ten bead bars (in a box) • An assortment of grey bead bars (subtraction bars) • A special notched card for the purpose of counting and marking. • Two boxes or trays; one to contain the addition bars and the other to contain the subtraction bars that have been counted. • Golden beads (units) 	<ul style="list-style-type: none"> • To familiarize children with subtraction as an unknown-addend problem

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Table 17, Math Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>1.OA.C.5 - Add and subtract within 20, demonstrating fluency for addition and subtraction within 10. Use strategies such as counting on; making ten (e.g., $8 + 6 = 8 + 2 + 4 = 10 + 4 = 14$); decomposing a number leading to a ten (e.g., $13 - 4 = 13 - 3 - 1 = 10 - 1 = 9$); using the relationship between addition and subtraction (e.g., knowing that $8 + 4 = 12$, one knows $12 - 8 = 4$); and creating equivalent but easier or known sums (e.g., adding $6 + 7$ by creating the known equivalent $6 + 6 + 1 = 12 + 1 = 13$).</p>	<ul style="list-style-type: none"> • Number rods • Base board; golden beads (units, tens) • Created, laminated word problems (or sheets of word problems in binders with page protectors). • Colored bead bars • Addition snake game • Subtraction snake game 	<ul style="list-style-type: none"> • Adding and subtracting within 20, noting the relationship between addition and subtraction
<p>1.OA.D.7 - Understand the meaning of the equal sign and determine if equations involving addition and subtraction are true or false. For example, which of the following equations are true and which are false? $6 = 6$, $7 = 8 - 1$, $5 + 2 = 2 + 5$, $4 + 1 = 5 + 2$.</p>	<ul style="list-style-type: none"> • Addition snake game • Subtraction snake game • Colored bead bar box • Plus, minus, equal signs 	<ul style="list-style-type: none"> • Understand the meaning of the equal sign and determine if equations involving addition and subtraction are true or false.
<p>1.OA.D.8- Determine the unknown whole number in an addition or subtraction equation relating three whole numbers. For example, determine the unknown number that makes the equation true in each of the equations $8 + ? = 11$, $5 = _ - 3$, $6 + 6 = _$.</p>	<ul style="list-style-type: none"> • Colored bead bar box • Laminated problems in the abstract (or sheet-protected pages in binders). 	<ul style="list-style-type: none"> • Determine the unknown whole number in an addition or subtraction equation relating 3 whole numbers.

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Table 17, Math Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.NBT.A.1 - Count to 120, starting at any number less than 120. In this range, read and write numerals and represent a number of objects with a written numeral.	<ul style="list-style-type: none"> • Wooden hierarchical material • Golden beads • Large bead frame 	<ul style="list-style-type: none"> • Counting to 120. • Reading and writing numerals and represent a number of objects with a written numeral
1.NBT.B.2 - Understand that the two digits of a two-digit number represent amounts of tens and ones. Understand the following as special cases: <ul style="list-style-type: none"> • 10 can be thought of as a bundle of ten ones — called a “ten.” • The numbers from 11 to 19 are composed of a ten and one, two, three, four, five, six, seven, eight, or nine ones. • The numbers 10, 20, 30, 40, 50, 60, 70, 80, 90 refer to one, two, three, four, five, six, seven, eight, or nine tens (and 0 ones) 	<ul style="list-style-type: none"> • Golden beads • Ten board • Teen board 	<ul style="list-style-type: none"> • Understanding place value through tens.
1.NBT.B.3 - Compare two two-digit numbers based on meanings of the tens and ones digits, recording the results of comparisons with the symbols $>$, $=$, and $<$.	<ul style="list-style-type: none"> • Golden beads • Stamp game • Large bead frame 	

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Table 17, Math Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.NBT.C.4 - Add within 100, including adding a two-digit number and a one-digit number, and adding a two-digit number and a multiple of 10, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used. Understand that in adding two-digit numbers, one adds tens and tens, ones and ones; and sometimes it is necessary to compose a ten.	<ul style="list-style-type: none"> • Golden beads • Stamp game • Large bead frame 	<ul style="list-style-type: none"> • To confidently add numbers within 100
1.NBT.C.5 - Given a two-digit number, mentally find 10 more or 10 less than the number, without having to count; explain the reasoning used.	<ul style="list-style-type: none"> • Subtraction snake game • Golden beads • Stamp game • Large bead frame 	<ul style="list-style-type: none"> • Adding in the abstract using mental math.
1.NBT.C.6 - Subtract multiples of 10 in the range 10-90 from multiples of 10 in the range 10-90 (positive or zero differences), using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used	<ul style="list-style-type: none"> • Subtraction snake game • Golden beads • Stamp game • Large bead frame 	<ul style="list-style-type: none"> • Subtract multiples of 10 in the range of 10-90 using concrete models or drawings and strategies.
1.MD.A.1 - Order three objects by length; compare the lengths of two objects indirectly by using a third object	<ul style="list-style-type: none"> • Number rods 	<ul style="list-style-type: none"> • Comparing the length of two objects by using a third object.

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Table 17, Math Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.MD.A.2 - Express the length of an object as a whole number of length units, by laying multiple copies of a shorter object (the length unit) end to end; understand that the length measurement of an object is the number of same-size length units that span it with no gaps or overlaps. Limit to contexts where the object being measured is spanned by a whole number of length units with no gaps or overlaps	<ul style="list-style-type: none"> • Wooden hierarchical material • Paper, pencil, scissor • Paperclips 	<ul style="list-style-type: none"> • To understand that multiple copies of a shorter object express the length of a larger object. • To introduce the child to the idea of an agreement among people to use a common unit when measuring
1.MD.B.3 - Tell and write time in hours and half-hours using analog and digital clocks.	<ul style="list-style-type: none"> • Created, laminated Montessori material • Judy clock 	<ul style="list-style-type: none"> • Tell and write time in hours and half-hours
1.MD.C.5 - Organize, represent, and interpret data with up to three categories; ask and answer questions about the total number of data points, how many in each category, and how many more or less are in one category than in another.	<ul style="list-style-type: none"> • Created material representing pictographs and bar graphs, and material matching graphs to data. 	<ul style="list-style-type: none"> • To learn how to create graphs and interpret the data.
1.G.A.1 - Distinguish between defining attributes (e.g., triangles are closed and three-sided) versus non-defining attributes (e.g., color, orientation, overall size); build and draw shapes to possess defining attributes.	<ul style="list-style-type: none"> • Geometric cabinet • Equivalency material 	<ul style="list-style-type: none"> • Distinguish between defining and non-defining attributes.

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Table 17, Math Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (MATH)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>1.G.A.2 Compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) or three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) to create a composite shape and compose new shapes from the composite shape.</p>	<ul style="list-style-type: none"> • Constructive triangles • Fraction material 	<ul style="list-style-type: none"> • To understand that putting two or more shapes together creates a new shape.
<p>1.G.A.3 - Partition circles and rectangles into two and four equal shares, describe the shares using the words halves, fourths, and quarters, and use the phrases half of, fourth of, and quarter of. Describe the whole as two of, or four of the shares. Understand for these examples that decomposing into more equal shares creates smaller shares.</p>	<ul style="list-style-type: none"> • Fraction circles inset material, divided square metal insets, divided triangle metal insets, three boxes of constructive triangles (triangular, small hexagonal, large hexagonal) 	<ul style="list-style-type: none"> • To introduce the idea of a quantity being divided into equal portions. • To show that the geometric representation of the unit can be any shape or size and that the geometric shape or size of a fraction depends on the geometric shape or size of the unit.

Table 18

English Table, Kindergarten

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.RL.KID.1 - With prompting and support, ask and answer questions about key details in a text.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details.
K.RL.KID.2 - With prompting and support, retell stories, including key details.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons, reading groups, literature circles Story card material 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details.
K.RL.KID.3 - Describe characters, settings, and major events in a story, using key details.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles Created Montessori materials matching concept and definition for the following terms: character, setting; major event 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details. To learn the following concepts: character, setting; major event.
K.RL.CS.4 - Ask and answer questions about unknown words in a text.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details.

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Table 18, English Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.RL.CS.4 - Recognize common types of texts (e.g., storybooks, poems)	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To help students understand the difference between fiction and fact, between story books and informational books.
K.RL.CS.6 - With prompting and support, name the author and illustrator of a story and define the role of each in telling the story.	<ul style="list-style-type: none"> Teacher read aloud 	<ul style="list-style-type: none"> To identify the roles of author and illustrator in the telling of the story
K.RL.IKI.7 - With prompting and support, describe the relationship between illustrations and the story in which they appear (e.g., what moment in a story an illustration depicts).	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To identify details in a story
K.RL.IKI.9 - With prompting and support, compare and contrast the adventures and experiences of characters in stories.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To identify the differences in experiences between characters; to identify details
K.RL.RRTC.10 With prompting and support, read stories and poems of appropriate complexity for Kindergarten.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups, or literature circles Created Montessori materials 	<ul style="list-style-type: none"> To read with appropriate fluency and accuracy in the areas of both decoding, and comprehension

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Table 18, English Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>K.FL.PC.1 - Demonstrate understanding of the organization and basic features of print.</p> <ul style="list-style-type: none"> a. Follow words from left to right, top to bottom, and page by page b. Recognize that spoken words are represented in written language by specific sequences of letters c. Understand that words are separated by spaces in print d. Recognize and name all upper-and lowercase letters of the alphabet 	<ul style="list-style-type: none"> • Moveable Alphabet 	<ul style="list-style-type: none"> • Recognizing the distinguishing features of a sentence
<p>K.FFL.PA.2 - Demonstrate understanding of spoken words, syllables, and sounds (phonemes).</p> <ul style="list-style-type: none"> e. Recognize and produce rhyming words. f. Count, pronounce, blend, and segment syllables in spoken words. g. Blend and segment onsets and times of single-syllable spoken words. h. Isolate and pronounce the initial, e i. Recognize and name all upper-and lowercase letters of the alphabet 	<ul style="list-style-type: none"> • Grace and Courtesy: modeling correct grammar and pronunciation while speaking 	<ul style="list-style-type: none"> • Providing a model for correct speech

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Table 18, English Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>K.FFL.PWR.3 - Know and apply grade-level phonics and word analysis skills in decoding words.</p> <p>a. Demonstrate basic knowledge of one-to-one letter-sound correspondences by producing the primary or many of the most frequent sound of each consonant.</p> <p>b. Associate the long and short sounds with common spellings (graphemes) for the five major vowels.</p> <p>c. Read common high-frequency words by sight (e.g., the, of, to, you, she, my, is, are, do, does)</p> <p>d. Distinguish between similarly spelled words by identifying the sounds of the letters that differ.</p>	<ul style="list-style-type: none"> Phonetic object box, phonogram object box, puzzle word material, phonogram booklets/nomenclature elementary word study with movable alphabet (suffixes, prefixes, compounds, word families). 	<ul style="list-style-type: none"> associate long vowel sounds with common spellings associate short vowel sounds with common spellings reads common high frequency words tell the difference between words that are spelled similarly
<p>K.FFL.F.5 - Read emergent-reader texts with purpose and understanding.</p>	<ul style="list-style-type: none"> Command cards, interpretive reading cards, picture/story cards. 	<ul style="list-style-type: none"> read on-level text with purpose on successive readings read on-level text with understanding on successive readings read on-level text orally with accuracy on successive readings

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Table 18, English Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>K.W.TTP.1 - Use a combination of drawing, dictating, and writing to compose opinion pieces in which they tell a reader the topic or the name of the book they are writing about and state an opinion of preference about the book (e.g., My favorite book is...)</p>	<ul style="list-style-type: none"> • Small group lessons • Created picture/story cards with text 	<ul style="list-style-type: none"> • Students will learn to identify what is an opinion, and will be able to apply this knowledge in their writing.
<p>K.W.TTP.2 - Use a combination of drawing, dictating, and writing to compose informative/explanatory texts in which they name what they are writing about and supply some information about the topic.</p>	<ul style="list-style-type: none"> • Small group lessons • Created picture/story cards with text 	<ul style="list-style-type: none"> • Students will learn to identify what is a fact, and will be able to apply this knowledge in their writing.
<p>K.W.TTP.3 - Use a combination of drawing, dictating, and writing to narrate a single event or several loosely linked events, tell about the events in the order in which they occurred, and provide a reaction to what happened.</p>	<ul style="list-style-type: none"> • Small group lessons • Created picture/story cards with text beginning with the following words: first, next, then and last. 	<ul style="list-style-type: none"> • Students will identify the following terms in writing: first, next, then, last. • Students will be able to create stories using temporal words to indicate event order and sequence.
<p>K.W.PDW.5 - With guidance and support from adults, respond to questions and suggestions from peers and add details to strengthen writing as needed.</p>	<ul style="list-style-type: none"> • AMI Montessori language arts lesson: Composing a Paragraph 	<ul style="list-style-type: none"> • To write paragraphs using a logical structure • To recognize and compose various types of paragraphs • To achieve facility with proofreading for paragraphs

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Table 18, English Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
K.W.RBPK.7 - Participate in shared research and writing projects (e.g. explore a number of books by a favorite author and express opinions about them).	<ul style="list-style-type: none"> • “How-to” books • Created sequence story materials (pre-made stories available at Montessori 123). Stories can include “How to make a peanut butter and jelly sandwich,” and “How to give a dog a bath,” and etc. 	<ul style="list-style-type: none"> • To increase understanding of the research and writing process. • To be able to create a short summary and/or report of a specific topic.
K.W.RBPK.8 - With guidance and support from adults, recall information from experiences or gather information from provided sources to answer a question.	<ul style="list-style-type: none"> • Small group writing lesson • Question and Answer Game (Biology album) • Story card material...a few sets containing stories of a different animal in each set (Biology album) 	<ul style="list-style-type: none"> • To recall and reassemble information in order to make it comprehensible. • To use a variety of resources to answer a research-based question.
<p>K.SL.CC.1 - Participate in collaborative conversations with diverse partners about kindergarten topics and texts with peers and adults in small and larger groups.</p> <ol style="list-style-type: none"> Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion). Continue a conversation through multiple exchanges 	<ul style="list-style-type: none"> • Grace and courtesy lessons involving the teacher modeling a lesson on speaking and listening in turn, and having students re-enact the various scenarios. • Small group dialogue involving teacher and students asking questions, commenting, and responding to comments. 	<ul style="list-style-type: none"> • Students will learn to have a conversation which involves speaking, listening, questioning, and collaboration of thoughts and ideas. • Students will learn to ask questions pertaining to the topic and/or text at hand.

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Table 18, English Table, Kindergarten (cont'd)

KINDERGARTEN TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>K.SL.2: Confirm understanding of a text read aloud or information presented orally or through other media by asking and answering questions about key details and requesting clarification if something is not understood.</p>	<ul style="list-style-type: none"> • Story card material • Read-aloud or literature circles. 	<ul style="list-style-type: none"> • Students will be able to formulate questions based upon text that has been read, respond to questions about the text, regarding key details.
<p>K.SL.3: Ask and answer questions in order to seek help, get information, or clarify something that is not understood.</p>	<ul style="list-style-type: none"> • Small Group Lessons 	<ul style="list-style-type: none"> • Students will listen to a lesson in story to gather additional information or clarify content.

Table 19

English Table, First Grade

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.RL.KID.1 - Ask and answer questions about key details in a text.	<ul style="list-style-type: none"> Teacher read loud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details.
1.RL.KID.2 - Retell stories, including key details, and demonstrate understanding of their central message or lesson.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons, reading groups, literature circles Story card material 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details
1.RL.KID.3 - Describe characters, settings, and major events in a story, using key details.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles Created Montessori materials matching concept and definition for the following terms: character, setting; major event 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details. To learn the following concepts: character, setting; major event.
1.RL.CS.4 - Identify words and phrases in stories or poems that suggest feelings or appeal to the senses.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles. Created Montessori materials. 	<ul style="list-style-type: none"> To increase reading comprehension and understanding of text through answering questions regarding key details

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Table 19, English Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.RL.CS.5 - Explain major differences between books that tell stories and books that give information, drawing on a wide reading of a range of text types.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles. 	<ul style="list-style-type: none"> To help students understand the difference between fiction and fact, between story books and informational books.
1.RL.CS.6 - Identify who is telling the story at various points in a text.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To identify the narrator of the story.
1.RL.IKI. 7 - Use illustrations and details in a story to describe its characters, setting, or events.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To identify details in a story
1.RL.IKI.9 - Compare and contrast the adventures and experiences of characters in stories.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups of similar proficiency, or literature circles 	<ul style="list-style-type: none"> To identify the differences in experiences between characters; to identify details
1.RL.RRTC.10 - With prompting and support, read prose and poetry of appropriate complexity for grade.	<ul style="list-style-type: none"> Teacher read aloud Small group lessons with reading groups, or literature circles Created Montessori materials 	<ul style="list-style-type: none"> To read with appropriate fluency and accuracy in the areas of both decoding, and comprehension.
1.FL.PC.1 - Demonstrate understanding of the organization and basic features of print. Recognize the distinguishing features of a sentence (e.g. first word, capitalization, ending punctuation).	<ul style="list-style-type: none"> Montessori Language Arts Lessons: Capital Letters, Period, Sentence Building: Concept and Language Punctuation charts Other created punctuation material 	<ul style="list-style-type: none"> Recognizing the distinguishing features of a sentence

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Table 19, English Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.FL.PC.1 - Demonstrate understanding of the organization and basic features of print.	<ul style="list-style-type: none"> The Story of Our Alphabet story and charts depicting different alphabets throughout the ages Created Montessori nomenclature/three part cards 	<ul style="list-style-type: none"> Student will be able to: recognize all upper case and lower case letters, follow words from left to right, follow words from top to bottom, and follow words page by page
1.FL.PC.1(a) - Recognize the distinguishing features of a sentence (e.g. first word, capitalization, ending punctuation).	<ul style="list-style-type: none"> <i>Capital Letters Lesson</i> with punctuation charts (some cards with punctuation rules), books <i>Period Lesson</i> with punctuation charts, colored pencils Several cards of one-page laminated text containing no punctuation. Corresponding control chart with punctuation 	<ul style="list-style-type: none"> For the children to properly place capital letters in their work For the children to use punctuation materials in order to extend their knowledge
1.FL.PWR.3 - Know and apply grade-level phonics and word analysis skills in decoding words.	<ul style="list-style-type: none"> Phonetic object box, phonogram object box, puzzle word material, phonogram booklets/nomenclature elementary word study with movable alphabet (suffixes, prefixes, compounds, word families). 	<ul style="list-style-type: none"> associate long vowel sounds with common spellings associate short vowel sounds with common spellings reads common high frequency words tell the difference between words that are spelled similarly

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Table 19, English Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>1.FL.PA.2 - Demonstrate understanding of spoken words, syllables, and sounds (phonemes).</p>	<ul style="list-style-type: none"> • Grace and Courtesy: modeling correct grammar and pronunciation while speaking • <i>I Spy Game</i> 	<ul style="list-style-type: none"> • Providing a model for correct speech. • produce rhyming words • count syllables in spoken words • say syllables in spoken words • blend syllables in spoken words • segment syllables in spoken words • blend onsets and rimes of single syllable words • segment onsets and rimes of single syllable words • isolate the beginning sounds in CVC words • say the beginning sounds in CVC words • isolate the middle sounds in CVC words • say the middle sound in CVC words • isolate the ending sounds in CVC words • say the ending sound in CVC words • add individual sounds in one-syllable words • substitute individual sounds in one syllable words

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Table 19, English Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.FL.WC.4 - Read with sufficient accuracy and fluency to support comprehension.	<ul style="list-style-type: none"> Command cards, interpretive reading cards, picture/story cards. 	<ul style="list-style-type: none"> read on-level text with purpose on successive readings read on-level text with understanding on successive readings read on-level text orally with accuracy on successive readings read on-level text orally with expression on successive readings use context to confirm word recognition use context to confirm understanding use context to self-correct word recognition use context to self-correct understanding
1.W.TTP.1 - Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.	<ul style="list-style-type: none"> Small group lessons Created picture/story cards with text 	<ul style="list-style-type: none"> Students will learn to identify what is an opinion, and will be able to apply this knowledge in their writing.
1.W.TTP.2 - Write informative/explanatory texts in which they name a topic, supply some facts about the topic, and provide some sense of closure.	<ul style="list-style-type: none"> Small group lessons Created picture/story cards with text 	<ul style="list-style-type: none"> Students will learn to identify what is a fact, and will be able to apply this knowledge in their writing.
1.W.TTP.3 - Write narratives in which they recount two or more appropriately sequenced events, include some details regarding what happened, use temporal words to signal event order, and provide some sense of closure.	<ul style="list-style-type: none"> Small group lessons Created picture/story cards with text beginning with the following words: first, next, then and last. 	<ul style="list-style-type: none"> Students will identify the following terms in writing: first, next, then, last. Students will be able to create stories using temporal words to indicate event order and sequence.

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Table 19, English Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.W.PDW.5 - With guidance and support from adults, focus on a topic, respond to questions and suggestions from peers, and add details to strengthen writing as needed.	<ul style="list-style-type: none"> • AMI Montessori language arts lesson: Composing a Paragraph 	<ul style="list-style-type: none"> • To write paragraphs using a logical structure • To recognize and compose various types of paragraphs • To achieve facility with proofreading for paragraphs
1.W.PDW.6 - With guidance and support from adults, use a variety of digital tools to produce and publish writing, including in collaboration with peers.	<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> • Students will be comfortable and adept at basic computer skills, such as logging on, keyboarding, and using hand-held devices to engage with digital media. • Students will continue exploring ways to use digital tools to produce and publish writing, both independently and in collaboration with their peers.
1.W.RBPK.7 - Participate in shared research and writing projects (e.g. explore a number of “how-to” books on a given topic and use them to write a sequence of instructions).	<ul style="list-style-type: none"> • “How-to” books • Created sequence story materials (pre-made stories available at Montessori 123). Stories can include “How to make a peanut butter and jelly sandwich,” and “How to give a dog a bath,” and etc. 	<ul style="list-style-type: none"> • To increase understanding of the research and writing process. • To be able to create a short summary and/or report of a specific topic.
1.W.RBPK.8 - With guidance and support from adults, recall information from experiences or gather information from provided sources to answer a question.	<ul style="list-style-type: none"> • Small group writing lesson • Question and Answer Game (Biology album) • Story card material...a few sets containing stories of a different animal in each set (Biology album) 	<ul style="list-style-type: none"> • To recall and reassemble information in order to make it comprehensible. • To use a variety of resources to answer a research-based question.

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Table 19, English Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
<p>1.SL.CC.1 - Participate in collaborative conversations with diverse partners about grade 1 topics and texts with peers and adults in small and larger groups.</p>	<ul style="list-style-type: none"> • Grace and courtesy lessons involving the teacher modeling a lesson on speaking and listening in turn, and having students re-enact the various scenarios. • Small group dialogue involving teacher and students asking questions, commenting, and responding to comments. 	<ul style="list-style-type: none"> • Students will learn to ask questions pertaining to the topic and/or text at hand.
<p>1.SL.CC. 2 - Ask and answer questions about key details in a text read-aloud or information presented orally or through other media.</p>	<ul style="list-style-type: none"> • Story card material • Read-aloud or literature circles. 	<ul style="list-style-type: none"> • Students will be able to formulate questions based upon text that has been read, respond to questions about the text, regarding key details.
<p>1.SL.CC.3 - Ask and answer questions about what a speaker says in order to gather additional information or clarify something that is not understood.</p>	<ul style="list-style-type: none"> • Small Group Lessons 	<ul style="list-style-type: none"> • Teacher will tell one of the many story-based lessons from the various subject areas (e.g. great lessons, needs of the plant, fundamental needs of humans, etc.). Students will be given an opportunity to ask questions about the stories.
<p>1.SL.PKI.4 - Describe people, places, things, and events with relevant details, expressing ideas and feelings clearly.</p>	<ul style="list-style-type: none"> • Small Group Lessons 	<ul style="list-style-type: none"> • Students will be able to clearly describe people, places, things and events.

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Table 19, English Table, First Grade (cont'd)

FIRST GRADE TENNESSEE ACADEMIC STANDARDS (LANGUAGE ARTS)	CORRESPONDING MONTESSORI MATERIAL(S)	SAMPLE MONTESSORI LESSON GOALS AND OBJECTIVES
1.SL.PKI.5 - Add drawings or other visual displays to descriptions when appropriate to clarify ideas, thoughts, and feelings.	<ul style="list-style-type: none"> • Small Group Lessons 	<ul style="list-style-type: none"> • Use visual graphics to demonstrate understanding.
1.SL.PKI. 6 -Produce complete sentences when appropriate to task and situation.	<ul style="list-style-type: none"> • Small group lessons • Sentence analysis material • Created Montessori material 	<ul style="list-style-type: none"> • To identify the different between complete and incomplete thoughts.
1.L.1: Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.	<ul style="list-style-type: none"> • Small Group Lessons 	<ul style="list-style-type: none"> • Teacher will tell one of the many story-based lessons from the various subject areas (e.g. great lessons, needs of the plant, fundamental needs of humans, etc.). Students will be given an opportunity to ask questions about the stories.

1.3.H. Blended Learning

Invictus Nashville prides itself on the use of blended learning backed by research to support the developmental needs of the students we serve. Many of these curriculum choices have been woven into this application in the mission and vision as well as this section. Please reference the sections above. Invictus Nashville ultimately plans to be flexible in our approach to blended learning. While we do not plan for it to be our primary mode of instruction, we will utilize blended learning programs when they prove to be the most effective and in any unforeseen circumstances that require the use of online learning tools.

1.3.I. Existing Operator Design Shifts

Not applicable, as Invictus Nashville is not an existing operator.

1.4. Academic Performance Standards

In this section:

- Describe the proposed school’s annual and long-term academic achievement goals.
- Describe the process for setting, monitoring, and revising academic achievement goals.
- Describe corrective action plans if the school falls below state, district and/or its own academic achievement goals.
- Describe the proposed school’s approach to helping remediate students’ academic underperformance and learning loss, including plans for Response to Instruction and Intervention (RTI²) that aligns with Tennessee guidelines.
- Describe goals for student attendance and explain how the proposed school will ensure high rates of student attendance. Include plans for identifying and addressing chronic absenteeism.
- Explain how students will matriculate through the proposed school (i.e. promotion/retention policies).
- Provide the proposed school’s exit standards for students, including graduation requirements. These should clearly set forth what students in the last grade served will know and be able to do.

1.4.A. Annual and Long-Term Academic Achievement Goals

The academic goals set forth in this section support the mission and vision of Invictus Nashville Charter School by ensuring that students meet the appropriate benchmarks throughout their time at Invictus to be prepared to excel in high school and any postsecondary opportunity of their choice. Invictus Nashville has constructed its annual and long-term goals using the guidance of the Tennessee Public Charter School Commission.⁷⁶ The Framework addresses academic, financial, and organizational benchmarks that charter schools in Tennessee are evaluated based on, so Invictus uses those benchmarks as a guide in setting our own goals to ensure alignment with state priorities and metrics. In addition, we have created goals that align to our unique mission that are not tied to the State Board of Education’s Charter School Performance Framework. These goals include the PISA Global Competence Framework, SEL goals tied to the Habits of Success, and goals for community partners and parent engagement. We address both elementary and middle school goals here, knowing that our middle school goals will likely see more adjustments as we gather robust data throughout the growth of our elementary and middle school. **Table 20, Table 21, Table 22, and Table 23** display Invictus’ goals.

⁷⁶ Tennessee Charter School Commission. “Charter School Performance Framework.” Tennessee Charter School Commission, 2022.

Table 20**Invictus Nashville School Goals⁷⁶**

CATEGORY	GRADE BAND	DESCRIPTION	GOAL
Invictus Academic Goal	K–8	NWEA MAP Assessments	85% of students meet their Fall-to-spring growth goals.
Absolute Achievement	3–8	Absolute performance in ELA, as measured by Tennessee state assessments—Percent of students scoring On Track/Mastered	60% of students scoring On Track or Mastered in 3rd grade; 90% by 8th grade
Absolute Achievement	3–8	Absolute performance in math, as measured by Tennessee state assessments—Percent of students scoring On Track/Mastered	55% of students scoring On Track or Mastered in 3rd grade; 85% by 8th grade
Absolute Achievement	3–8	Absolute performance in science, as measured by Tennessee State Assessments—Percent of students scoring On Track/Mastered	70% of students scoring On Track or Mastered in 3rd grade; 85% by 8th grade
Comparative Achievement	3–8	School comparative performance to authorizing district average in ELA	Greater than 10% above the district average
Comparative Achievement	3–8	School comparative performance to authorizing district average in math	Greater than 10% above the district average
Comparative Achievement	3–8	School comparative performance to authorizing district average in science	Greater than 10% above the district average
Comparative Achievement	3–8	School comparative performance to authorizing district average in social studies	Greater than 10% above the district average
Growth	K–8	TVAAS overall composite index	Level 5
Absolute Attendance	K–8	The percent of students missing 10 percent or more of enrolled school days	96% or greater
Chronic Absenteeism	K–8	The percent of students missing 10 percent or more of enrolled school days	Less than 5%

Table 21

Invictus Nashville Culture Goals

CATEGORY	GRADE BAND	DESCRIPTION	GOAL
Discipline	K-8	Suspension Rate	Less than 5%
Enrollment	K-8	Student Attrition Rate	Less than 10%
Staff	K-8	Teacher Retention Rate	90% or higher

Table 22

Invictus Nashville Fiscal Goals

CATEGORY	DESCRIPTION	GOAL
Near Term	Finance Current Ratio: Assets divided by Liabilities	Greater than or equal to 1.1
Near Term	Finance Unrestricted Days Cash	60 days cash
Near Term	Enrollment Enrollment Variance	Greater than or equal to 95%
Near Term	Finance Default	No defaulted or delinquent payments
Sustainability	Finance Total Margin	Aggregated 3-year total margin is positive and the most recent year Total, Margin is positive
Sustainability	Finance Debt to Asset Ratio	Asset Ratio Ratio is less than 0.9
Sustainability	Finance Cash Flow	Multi-year cumulative cash flow is positive and cash flow is positive each year
Sustainability	Finance Debt Service Coverage Ratio	Ratio is equal to or greater than 1:1

Table 23

Invictus Nashville Organization Goals

INDICATOR	CATEGORY	DESCRIPTION/GOAL
Education Program	Charter Fidelity	The school is implementing the material terms of the education program in all respects and the program reflects the material terms as defined in the charter, or there has been an approved modification.
Education Program	Compliance	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to education requirements, including:</p> <ul style="list-style-type: none"> ◆ Instructional days or minutes ◆ Graduation and promotion ◆ Content standards ◆ State assessments ◆ Implementation of mandated programming tied to funding
Education Program	Students with Disabilities	<p>Consistent with the school’s status and responsibilities as a Local Education Agency (LEA), the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatments of students with identified disabilities and those suspected of having a disability, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Equitable access and opportunity to enroll ◆ Identification and referral ◆ Appropriate development and implementation of Individualized Education Plans and Section 504 plans ◆ Operational compliance, including provision of services in the least restrictive environment and appropriate inclusion in the school’s academic program, assessments, and extracurricular activities ◆ Discipline, including due process protections, manifestation determinations, and behavioral intervention plans ◆ Access to the school’s facility and program students in a lawful manner and consistent with students’ IEPs or Section 504 Plans ◆ Securing of all applicable funding

Table 23, Invictus Organizational Goals (cont'd)

INDICATOR	CATEGORY	DESCRIPTION/GOAL
Education Program	English Language Learners	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (Including Title III of the Elementary and Secondary Education Act (ESEA) and the US Department of Education authorities) relating to the English Language Learner requirements, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Required policies related to the service of ELL students ◆ Proper steps for identification of students in need of ELL services ◆ Appropriate and equitable delivery of services to identified students ◆ Appropriate accommodations on assessments ◆ Exiting of students from ELL services ◆ Ongoing monitoring of exited students
Financial Management	Reporting and Compliance	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial reporting requirements, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Complete and on-time submission of financial reports, including annual budget, revised budget (if applicable), periodic financial reports as required by the authorizer ◆ On-time submission and completion of annual independent audit and corrective action plans, if applicable ◆ All reporting requirements related to the use of public funds
Financial Management	Generally Accepted Accounting Principles	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to financial management and oversight expectations as evidence by an annual independent audit, including but not limited to:</p> <ul style="list-style-type: none"> ◆ An unqualified audit opinion ◆ An audit devoid of significant findings and conditions, material weaknesses, or significant internal control weaknesses

Table 23, Invictus Organizational Goals (cont'd)

INDICATOR	CATEGORY	DESCRIPTION/GOAL
Governance and Reporting	Compliance	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to governance by its board, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Board Policies ◆ Board bylaws ◆ State open meetings law ◆ Code of ethics ◆ Conflicts of interest ◆ Board composition and/or membership rules (e.g., requisite number of qualified teachers, ban on employees or contractors serving on the board, etc.) ◆ Compensation for attendance at meetings
Governance and Reporting	Management	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to oversight of school management, including but not limited to:</p> <ul style="list-style-type: none"> ◆ (For others) oversight of management that includes holding it accountable for performance expectations which may or may not be agreed to under a written performance agreement.
Governance and Reporting	Reporting	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to relevant reporting requirements to the school’s authorizer, State Education Agency (SEA), district education department, and/or federal authorities, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Accountability tracking ◆ Attendance and enrollment reporting ◆ Compliance and oversight ◆ Additional information request by authorizer

Table 23, Invictus Organizational Goals (cont'd)

INDICATOR	CATEGORY	DESCRIPTION/GOAL
Students and Employees	Student Rights	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the rights of students, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Policies and practices related to admissions, lottery, waiting lists, fair and open recruitment, and enrollment (including rights to enroll or maintain enrollment) ◆ The collection and protection of student information (that could be used in discriminatory ways or otherwise contrary to law) Due process protections, privacy, civil rights, and student liberties requirements, including First Amendment protections and the Establishment Clause restrictions prohibiting public schools from engaging in religious instruction. ◆ Conduct of discipline (discipline hearings and suspension and expulsion policies and practices)
Students and Employees	Attendance	The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to attendance goals.
Students and Employees	Teacher Credentialing	The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (Including the federal Highly Qualified Teacher and Paraprofessional requirements within Title II of the Elementary and Secondary Education Act [ESEA]) relating to state certification requirements.
Students and Employees	Employee Rights	The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to employment considerations, including those relating to the Family Medical Leave Act, the Americans with Disabilities Act, and employment contracts. The school does not interfere with employees' rights to organize collectively or otherwise violate staff collective bargaining rights.
Students and Employees	Background Checks	The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to background checks of all applicable individuals (including staff and members of the charter community, where applicable).

Table 23, Invictus Organizational Goals (cont'd)

INDICATOR	CATEGORY	DESCRIPTION/GOAL
School Environment	Facilities and Transportation	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds, and transportation, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Americans with Disabilities Act (ADA) ◆ Fire inspections and related records ◆ Viable certificate of occupancy or other required building use authorization ◆ Documentation of requisite insurance coverage ◆ Student transportation
School Environment	Health and Safety	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to safety and the provision of health-related services, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Appropriate nursing services and dispensing of pharmaceuticals ◆ Food service requirements ◆ Other district services, if applicable
School Environment	Information Processing	<p>The school materially complies with applicable laws, rules, regulations, and provisions of the handling of information, including but not limited to:</p> <ul style="list-style-type: none"> ◆ Maintaining the security of and providing access to student records under the Family Educational Rights and Privacy Act and other applicable authorities ◆ Accessing documents maintained by the school under the state's Freedom of Information law and other applicable authorities ◆ Transferring of student records ◆ Proper and secure maintenance of testing materials

Table 23, Invictus Organizational Goals (cont'd)

INDICATOR	CATEGORY	DESCRIPTION/GOAL
Committed Community	Families are partners in the learning process	<ul style="list-style-type: none"> ◆ Percent of families completing synchronous/asynchronous volunteer hours (Goal=75%) ◆ Percent of attendance at conferences (Goal=75%) ◆ Percent of families attending community events (Goal=50% whole-school events/100% limited space events) ◆ Percent of families who report feeling connected with school faculty at Invictus (Goal=80%) ◆ Percent of families who report feeling their input is valued at Invictus (Goal=80%) ◆ Percent of families who report satisfaction with the support their students receive toward social and emotional development at Invictus (80%)
Committed Community	Community members inform and inspire the Invictus Learning program	<ul style="list-style-type: none"> ◆ Number of formal partner community organizations (Goal=3+ per academic year) ◆ Percent of community partners who request repeated collaboration or recommend a new partner organization (Goal=80%) ◆ Percent of students who report satisfaction with their social-emotional growth at Invictus (Goal=80%) ◆ Percent of students participating in community-based service projects (Goal= 100%)

Consistent with the school’s status and responsibilities as a Local Education Agency (LEA), the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act) relating to the treatments of students with identified disabilities and those suspected of having a disability, including but not limited to:

- ◆ Equitable access and opportunity to enroll
- ◆ Identification and referral
- ◆ Appropriate development and implementation of Individualized Education Plans and Section 504 plans

1.4.B. Setting, Monitoring, and Revising Goals

Setting Goals

Invictus Nashville will monitor the progress towards our goals using four categories of goal setting and tracking: absolute, comparative, growth, and organization. Our absolute goals will measure progress made each year without considering the performance of other schools, subgroups, or any other variables. Absolute goals will be used as hard targets for metrics such as proficiency by grade level, proficiency by subgroups, attendance data, family engagement data, community involvement data, and global competency data. Absolute goals at Invictus enforce the belief that when students attend our school for consecutive years, they will achieve better academic and social outcomes.

While absolute goals serve an important role in our accountability to student mastery, comparative and growth goals grant Invictus the opportunity to analyze a more complete and representative assessment of our performance as a school. Comparative goals will give Invictus Nashville the opportunity to monitor our achievement levels relative to other schools in the district and state. This will ensure that we continue to be a high-quality option for Davidson County and the Donelson/Hermitage families for elementary and middle school. Our growth goals allow Invictus to monitor our achievement data relative to the starting point of each school year. The combination of each type of goal allows for a robust assessment of Invictus’ effectiveness, as well as holding ourselves accountable to concrete, measurable goals. Goals will be set for each school year the summer prior—these internal goals will be based on yearly data, but they will be measuring points to accomplish our larger accountability goals, which will not change from year to year. This goal setting will be a collaborative process amongst all school leaders at Invictus, and they will be workshopped with the Board of Directors and community members to ensure the school is driving towards its mission and commitment to the community.

Monitoring Goals

Goal monitoring will be extensive at Invictus, with multiple checkpoints throughout each quarter and school year to ensure appropriate progress. **Table 24** shows the yearlong plan for monitoring progress towards our school goals.

Table 24**Invictus Nashville Goal Monitoring Plan**

FREQUENCY	MONITORING TOOL	WHERE	RESPONSIVE ACTION
Weekly	Teacher Coaching <i>Weekly debrief with coaches to plan, review instructional strategies, and monitor progress of all students and planning sessions.</i>	Weekly Coaching Meeting	Plans will be adjusted bi-weekly to reflect the most current data on students performance; if there is stagnation, the teacher will receive additional support, or student will have their RTI group adjusted.
Bi-weekly	Grade level progress monitoring of RTI ² program	Bi-weekly Grade Level meetings	Any immediate adjustments are made to groups; formal, routine adjustments are made every quarter.
Bi-weekly	Grade level meetings to analyze culture data	Bi-weekly Grade Level meetings	Action planning for culture gaps, i.e., attendance trends, mentoring trends, punctuality trends, intervention trends, etc.
Bi-weekly	Grade level progress monitoring of IEP, ELL, and 504 plans and goals	Bi-weekly Grade Level meetings	Immediate adjustments are made to supports.
Tri-weekly	Leadership Team Step-Back meetings	Every third week leadership meeting	Holistic review of school data to plan Professional Development and coaching focus areas.
Monthly	Department meeting	Monthly Department Meeting	Reteaches, spiral reviews, and small group instruction is adjusted and planned based on student mastery levels.
Every Six Weeks	Montessori Phonics Assessment	Weekly Coaching Meeting	Illuminate progress in the mechanical path. Compare growth to peers and other classes Inform literacy instruction.

Table 24, Invictus Nashville Goal Monitoring Plan (cont'd)

FREQUENCY	MONITORING TOOL	WHERE	RESPONSIVE ACTION
Quarterly	Interim Assessments (5–8)	Monthly Department Meetings	Quarterly Assessment to measure academic growth.
Bi-annual	TNReady Practice ELA, Writing, and Math (3–8)	Monthly Department Meetings	Discuss during collaborative meetings and/or instructional coaching Instructional coaches hold teachers accountable to making plans based on experience and results. Mentors will discuss results with students.
Bi-annual	Community surveys for students, families, teachers, and community members	First leadership meeting after results	Culture adjustments based on feedback from all stakeholders.
Tri-annual	Student Growth Portfolios (Kindergarten)	Bi-weekly Grade Level meetings	Discuss in collaboration groups facilitated by instructional coach and/or division lead teacher, set target scores for each child, plan instruction based on present levels and growth targets
Tri-annual	NWEA MAP Assessments	Fall, Winter, Spring	Analyze results by classroom, with instructional coach. Discuss in collaboration groups. Use as screener for intervention.
Semesterly	Student Village/Mentor Meetings	Semester Village/Mentor Meetings	Holistic review of all data with a student's village to plan for supports for the following semester.
Annually	TNReady Assessments (3–8)	Spring	Academic goals are adjusted annually as TNReady assessment data is released.
Annually	Leadership Team Summer Step Back (with Board and community input and review)	Each June/July	Annual step back meeting for data analysis, reflection, and goal setting for the following year.

Revising Goals

In collaboration with the leadership team, the proposed Executive Director and Board will revise school goals upon two key junctures each year. The leadership team consists of the Director of Operations and Assistant Director until Year 3. After that point, the leadership team will include Deans, Director of Student Supports, and Director of Expeditions and Strategic Partnerships. Though these revisions will in large part be making school goals more rigorous, not less. These two points will be: 1) each summer during the leadership team Summer Step Back and 2) when state test results are released each fall. Our goals may also shift in response to any policy and substantive structural changes made to the TNReady or other evaluation systems.

1.4.C. Corrective Action Plan

During the school year Invictus uses internal and external assessments named in the chart above to measure progress toward annual and long-term goals. The school leadership conducts frequent reviews of formal data through an internal data dashboard. The dashboard will be managed by the proposed Executive Director until the Elementary and Middle school directors are named. If data for individual students, subgroups, cohorts, or the whole school is not on-track for goal attainment, interventions begin on multiple levels. Should Invictus fall below state, district, or school academic achievement goals, we will be adhering to any local or state requirements. Our proposed Executive Director and Board will meet to review relevant data to create a comprehensive improvement plan that includes absolute goals, growth targets, and specific tools that will be used to monitor progress.

Our proposed Executive Director, along with the rest of the leadership team, will implement this plan and report back on progress at monthly board meetings and between meetings (bi-weekly), the proposed Executive Director will report progress to the Academic Committee. If the monthly reports consistently do not show improvement, the Board of Directors can convene and vote to provide additional support for the leadership team. This support can include but not limited to leadership coaching services and/or additional professional development opportunities. This reporting routine will continue until the school is meeting expectations. It is the responsibility of the Board to evaluate the Executive Director and should consider chronic underperformance as grounds for termination or nonrenewal of contract. Prior to considering the contract, the Board of Directors must have a documented plan of support to help the Executive Director improve their performance. The plan of support must have been implemented at a minimum of 90 days prior to termination or nonrenewal. Additional information about the process for evaluating and addressing underperformance will be detailed in **Section 2.4**.

1.4.D. Remediation and RTI²

Invictus Nashville has designed an academic program to be accessible to all students and equitable in addressing learner variability. Invictus Nashville will remediate students' academic underperformance and provide differentiated instruction to meet the needs of all students through the implementation of Tennessee's Response to Instruction and Intervention Framework (RTI²). Students' progress in achieving expectations is monitored to determine if students need further research-based instruction or intervention in a general education setting, special education identification and services, or both. The identification of which students need each Tier of support will be determined by a universal screener, such as Aimsweb and NWEA MAP.

We will also use continued progress monitoring and classroom observation to determine if students need additional interventions. Students will be able to move tiered groups once per quarter based on the data that is collected. Tier 3 students will have data collected weekly and Tier 2 students will have data collected bi-weekly. The RTI team will meet to discuss movement and placement at the end of each quarter. The team

will consist of a member from the leadership team, teacher, and RTI interventionist (if applicable). Oversight of this process will be divided between the Executive Director and Assistant Director until the Director of Student Supports is hired in Year 3.

The general framework for RTI² at Invictus Nashville is laid out in **Table 25** below, with a description of what each tier looks like at Invictus.

Table 25

Invictus Nashville RTI² Framework

TIER	DESCRIPTION
Tier 1 (All Students)	All Invictus Nashville students will receive research based, high quality instruction and social emotional support in our general education setting.
Tier 2 (10–15% of Students)	In addition to Tier 1, students in need of additional intervention, or acceleration, in their identified area(s) of need will receive high quality intervention matched to their area of need.
Tier 3 (3–5% of Students)	In addition to Tier 1, students who have not made significant progress in Tier 2 or who are significantly below grade level will receive more explicit and intensive interventions, provided by highly trained professionals

Tier 1: Students engage in high-quality grade-level instructional activities that are characterized by high expectations, standards-based instruction in whole-group, small-group, and individual settings, appropriate differentiation, and close monitoring of data to determine achievement and growth. Most students (80–85%) will have their needs met by Tier 1 instruction. Students performing in the top percentiles of Tier 1 may also receive enrichment opportunities.

Tier 2: Some students (10–15%) will need extra help in addition to Tier 1 instruction. These students have been identified as “at risk” in basic math and reading skills. Students in Tier 2 will receive daily interventions in reading, math, or both.

Tier 3: A small percentage of students who do not show adequate progress with Tier 2 interventions or who are significantly below grade level in reading, math, or both will receive additional more intensive and more explicit interventions to target skill deficits and prevent more severe gaps in learning and achievement.

- Students who fail to demonstrate adequate progress with Tier 2 and Tier 3 interventions will be considered for special education referral.

For entering kindergartners, we will use a Kindergarten Entry Inventory in place of the first round of universal basic screener to assess where students are when they begin at Invictus Nashville so we can offer appropriate support from the beginning. For students who entered at grade levels or mid-year, we will use our universal screener (Aimswest and/or NWEA MAP) during their onboarding for proper placement. Students who are identified in need of Tier 2 and Tier 3 interventions will receive focused small group instruction during class time or through pull-out small groups as appropriate within the school day. Interventions occur daily for a recommended time of 30 minutes for Tier 2 and 45–60 minutes for Tier 3, in addition to strong differentiated Tier 1 instruction. Interventions are research-based and target a student’s specific area of deficit such as reading fluency or mathematics calculation. To be effective interventions must meet three criteria:

1. Implemented by highly trained personnel
2. Implemented with fidelity and confirmed with measurement
3. Progress monitored to ensure outcomes are being met

Dibels focuses on foundation literacy skills for students that are in Tier III and SPED. It is important at this age to build foundational literacy skills. We can use this to monitor progress for our students. AimsWeb allows for both skills and progress monitoring based on many identifying factors including dyslexia which is required by law as outlined in Public Chapter 1058. Invictus will offer Extended school year based on student IEPs and ILPs. ESL students will receive 1 hour of direct services from certified teachers per the State Board of Education Chapter 0520-01-19 during their work cycles.

The two-teacher model and structure of the daily schedule at Invictus Nashville facilitate implementation of small group lessons and interventions, including strong differentiated Tier 1 instruction and more intensive re-teaching or remediating Tier 2 and Tier 3 interventions. Lead teachers or interventionists will work in small groups or with individuals while assistant teachers guide the remaining students as they work through individualized rosters of learning activities each day. **Section 1.9** further describe our approach to strong Tier 1 instruction and Tier 2, Tier 3, and Special Education interventions that ensure we equitably meet the needs of diverse learners.

1.4.E. Attendance Goals and Support

Invictus Nashville has an average daily attendance goal of at least 96% of students in attendance. Invictus is aligned with the MNPS attendance policy, and we expect all students to attend school each day. We accept the following reasons for an excused absence:

- Child's illness
- Serious illness in the family
- Head lice, maximum of three days
- Death in the family
- Religious holiday

Families who experience extenuating circumstances will receive special support from school leadership to problem-solve and prevent future absences. Examples include housing difficulties, transportation difficulties, or required family travel. When possible, parents should call, email, or send a written note to their assigned mentor/village leader in advance detailing the reason for the absence. Parents must justify an absence in writing within five days of the absence for it to be excused by the school.

Invictus Nashville will ensure high rates of attendance by closely monitoring attendance and frequently communicating about attendance with stakeholders. Attendance must be taken within 15 minutes of the start of the day by the mentor teachers. Front office staff will update attendance to reflect late arrivals and the school will make daily attendance calls to primary caregivers of absent students. The Director of Operations and Office Manager will serve as the attendance team in Y1 and Y2. As the separate School Directors are hired during our growth, they will also join the attendance team. This team will be responsible for designing and implementing systems that ensure:

1. Attendance is checked and reported daily for each class.
2. Excuses are submitted for absences and late arrivals.

3. System-wide procedures for accounting and reporting are followed with fidelity; and
4. Written notification is provided to the family of students of any attendance intervention action taken by the school.

Chronic Absenteeism

There was a report that determined “over the long term, chronic absenteeism is correlated to increased rates of high school dropout, adverse health outcomes and poverty in adulthood, and an increased likelihood of interacting with the criminal justice system.”⁷⁷ We know that students cannot be successful if they are not in attendance. By sixth grade, chronic absenteeism is one of the two biggest predictors of eventual drop out, along with GPA.⁷⁸ As a K–8 school, attendance will be top priority. Chronic absenteeism disproportionately impacts students of color, English language learners, students with disabilities, and low-income students.⁶⁴ With a focus on diversity in both subgroups and socioeconomic status, we plan to pursue high attendance relentlessly to avoid this chronic absenteeism statistic. Invictus Nashville will set rigorous student attendance goals, as well as punctuality goals, and implement systems of early identification, intervention, and escalation for students struggling with attendance. Our school mentors will be vital in supporting the identification and support of the family and student to address this issue. To reduce the number of students who are chronically absent (defined as missing 10% of school days) or who are at risk of becoming chronically absent, Invictus will implement the interventions outlined in **Table 26**.

77 Chronic Absenteeism and Its Impact on Achievement.” University of Delaware: Center for Research in Education and Social Policy, June 2018.

78 University of Chicago Consortium on Chicago School Research. (2014). Five key findings for middle grades from looking forward to high school and college. Retrieved from <http://www.attendanceworks.org/wp-content/uploads/2017/09/5-Key-Findings-MG-Final.pdf>

Table 26**Attendance Interventions**

ABSENCE THRESHOLD	ACTIONS/INTERVENTIONS
Daily absence not excused in advance	Contact guardians via call or text.
Three unexcused absences	Attendance notification.
Five unexcused absences	Attendance meeting between school representative and guardian. Attendance Improvement plan developed and shared with stakeholders. Truancy letter sent home.
Seven unexcused absences	Attendance meeting between school representative and guardian. Attendance Improvement plan reviewed and updated. Truancy next steps shared with families.
Ten unexcused absences	Invictus is mandated by Compulsory School Attendance Law (TCA § 49-6-3001) to report a truancy concern to the Juvenile Courts. School director communicates this requirement to families.

1.4.F. Matriculation Policies**Promotion Criteria Considerations -Grades K–5**

We will use data based on each child's social and academic development, as evidenced by standardized assessments, teacher observation, and student work results. Since children in the Montessori settings are in multi-age classrooms, the concept of promotion looks different from traditional schools. We explain to families that although their child will be with the same teacher for three years, we will inform them of the child's readiness to move on to the next grade, so they know that the child is progressing through the curriculum and meeting the standards appropriate for their grade level. The school will publish promotion guidelines by grade level annually, which are based on the school's Montessori curriculum, state standards, testing norms and benchmarks, and attendance requirements. These guidelines are used consistently across the school to assess whether a student has mastered grade-level material and is adequately prepared to be promoted each year. The child's teachers and academic team will ongoingly communicate about this information to the parents as the year progresses and will explain retention-related documentation and procedures if applicable.

Promotion Criteria Considerations—Grades 6 -8

Promotion to the next grade level at Invictus Nashville will be determined based on mastery of Tennessee State Standards in ELA, Math, Science, and Social Studies. Based on a student's prior achievement, we will consider whether they have mastered or are on track to master academic standards by 8th grade graduation. In addition, Invictus Nashville will consider the following in promotion decisions:

- ◆ Proficiency on TN Writing rubrics
- ◆ Proficiency and growth on TNReady Exams
- ◆ Participation in community service projects
- ◆ Global Competence scores across domains of the PISA Questionnaire
- ◆ Attendance
- ◆ *Where applicable:* Achievement of IEP goals
- ◆ *Where applicable:* Progress toward EL goals

When classroom assessments and/or universal screeners indicate that students are not achieving or demonstrating adequate progress toward grade level standards they will receive more intensive Tier 2 and Tier 3 interventions as described previously. In case students fail to meet grade level Tennessee standards or additional promotion metrics indicate the possibility that students will not be promoted to the following grade, parents will be notified with the quarterly report card and a support team will develop further interventions as described below.

Retention and Acceleration Considerations

The following criteria must be considered in case of either possible retention or possible acceleration of K–8 students:

- ◆ Grades and other indicators of academic achievement
- ◆ Physical, social, and emotional factors
- ◆ Progress on Individual Education Program (IEP) related goals and objectives

In cases where the school leaderships decide to recommend a child for retention, the following guideline must be considered:

Timing of Retentions

The established benchmark grade level for retention is 3rd grade. However, Invictus Nashville will also consider it 5th grade as well based on the Montessori bands. Students may be retained no more than two times during their K–8 school years. Retention should always be taken very seriously and only implemented if it is in the best interest of students.

Retention of Students with Special Needs

Special Education students who meet the goals of their IEP and English Learners who are making adequate progress in their individual program should not be considered for retention but should be considered for appropriate interventions.

Retention Process

Primary caregivers of students at risk of retention shall be notified in writing on a quarterly basis when report cards are issued. Retention recommendations should be considered in a meeting with a support team including parents, teachers, and school leadership that will develop appropriate interventions.

Interventions may include:

- ◆ Tier 2 or Tier 3 in-class interventions
- ◆ Extracurricular tutoring
- ◆ Summer school

In case students are not able to meet promotion criteria after focused, individualized interventions they will be retained in that grade level at the following year. Invictus Nashville will work to ensure that students see this as another opportunity to master grade level content and will work to establish strong relationships with teachers and the new student cohort to avoid the potential negative social impact of retention. It is our goal to avoid retention of students whenever possible, while at the same time we do not believe in promoting students who are not prepared to succeed in meeting the challenges of the next grade level.

In cases where the school director or teachers recommend a child for acceleration, a support team will convene including parents, teachers, and school leadership to consider the student's social and emotional growth along with academic factors. If the decision is made to accelerate the student, they may be accelerated no more than one grade level. The school director reserves the right to make the final decision about grade placement.

1.4.G. Exit Standards

Invictus Nashville's exit standards are the Tennessee State Standards in ELA, Math, Science, and Social Studies. While we believe that success across all our Invictus organizational priorities will ensure that our students are optimally prepared for success in future schooling and a meaningful life, 8th grade graduation eligibility is primarily determined by mastery of TN State Standards in ELA, Math, Science, and Social Studies as these are most directly aligned with the expectations and requirements of receiving high schools.

8th Grade Graduate Profile

Within Invictus Nashville, we operate under a broad definition of success and monitor a variety of metrics aligned with our organizational priorities to ensure that our graduates are prepared for the demands of high school, college, and future careers. Our graduate profile is guided by the cognitive skills that used to score the middle school projects. Cognitive Skills are interdisciplinary competencies that require higher-order thinking.⁷⁹ David Conley of the Education Policy Improvement Center (EPIC) calls these skills "cognitive strategies" and defines them as "ways of thinking necessary for college work."⁸⁰ The Center for Curriculum Redesign (CCR) suggests that these skills are "how we use what we know" and involve the four Cs: Creativity, Critical Thinking, Communication, and Collaboration. Educational researcher David Perkins (2014) describes 21st-century skills and dispositions as those that cultivate "critical and creative thinking, collaborative skills and dispositions, leadership, entrepreneurship, and related skills and dispositions that speak strongly to living and thriving in our era." While the terminology differs across frameworks, there is universal agreement across the research community on the importance of students developing Cognitive Skills.⁷⁰ In Middle School, most cognitive skills are assessed multiple times during the year in different subjects so that students, teachers, and families can track growth. To translate the average Cognitive Skills score into a course grade, the rubric levels are indexed to percentages for each grade level (see **Table 27**).

⁷⁹ The term "Cognitive Skills" comes from an influential report published by the National Research Council in 2012 entitled Education for Life and Work: Developing Transferable Knowledge for the 21st Century. The report acknowledges that domains of learning are interrelated, and that Cognitive Skills are required in multiple domains.

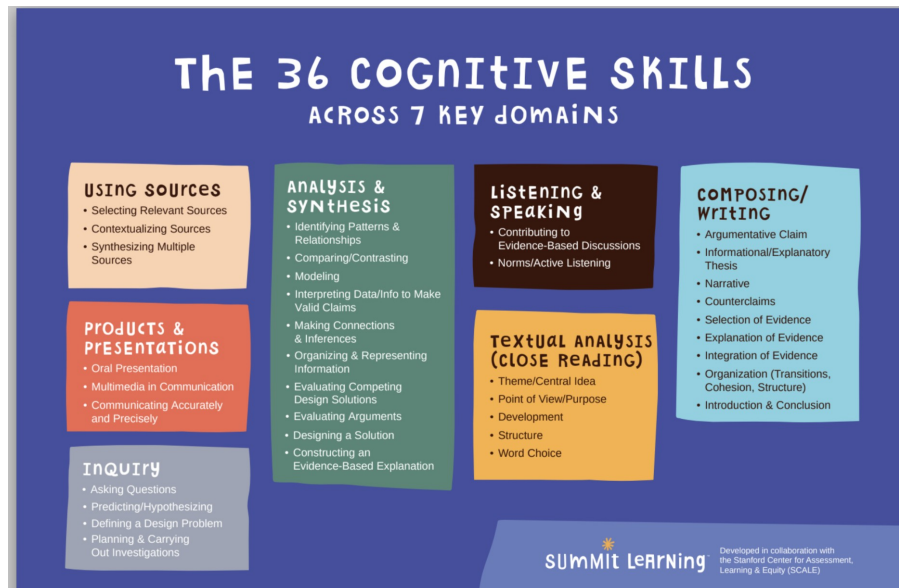
⁸⁰ Each of the leading frameworks differ slightly in the terminology they employ. See: Conley, D. (2012); Partnership for 21st Century Skills. (2016)

Table 27
Cognitive Skill Scores by Grade-Band

Grade Level	Cognitive Skill score corresponds to a grade of...		
	70%	85%	100%
4th	1	2	3
5th	1.5	2.5	3.5
6th	2	3	4
7th	2.5	3.5	4.5
8th	3	4	5
9th	3.5	4.5	5.5
10th	4	5	6
11th	4.5	5.5	6.5
12th	5	6	7

Throughout the year, students demonstrate their competency in the Cognitive Skills according to their levels of development, with the goal of becoming high-school ready by the end of 8th grade and college- and career-ready by the end of 12th grade. Please see **Figure 6** for a list of those cognitive skills.

Figure 6
Cognitive Skills



In addition, students have one-to-one mentoring every week. These mentoring sessions focus on social-emotional growth by developing the Habits of Success. Therefore, graduating 8th graders would have successfully shown mastery of cognitive skills and developed healthy habits of success based on the evaluation of their mentor, parents, and content teachers. The habits of success are listed below in **Figure 7**.

Figure 7

Habits of Success

**1.5. Phase-In/Turnaround Planning**

This section is not applicable, because Invictus Nashville is not proposing a conversion.

1.6. High School Graduation and Post-Secondary Readiness

This section is not applicable, because Invictus Nashville is not proposing a high school.

1.7. Assessments

In this section:

- Charter school students must take the same State-mandated assessments as students in other public schools.
- Charter schools also administer internal assessments. In this section:
- Identify the primary internal assessments the proposed school will use to assess the individual student and sub-group learning needs and progress throughout the year. Explain how these internal assessments align with the school’s curriculum, performance goals, and state standards.
- Identify the person(s), positions(s), and/or entries that will be responsible for and involved in the building testing coordination.
- Explain how the proposed school will collect and analyze student academic data and use it to inform instruction, professional development, and teacher evaluations.
- Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve instruction.

1.7.A. Interim Assessments

Invictus Nashville believes deeply in using data to promote accountability. We have high expectations and goals as a school, and we have planned measures to ensure we are meeting those goals annually. Part of meeting those goals annually is to have a robust assessment schedule throughout the year that gives us the information we need to assess individual student and sub-group learning needs, adjust instruction, and add support to ensure that we are meeting our goals by the end of the school year. The sections that follow detail our plan for robust internal assessment to ensure we are equipped with timely data to respond to in our instructional plan.

1.7.B. Primary Internal Assessments

Core to the Invictus mission is to become engaged members of society by helping them identify their unique path to personal and professional success. We believe deeply that a large part of achieving that mission is preparing students to be successful on high stakes exams that grant them access to opportunities. Because of that, we have built an internal assessment plan that builds towards demonstrating mastery on high stakes EOY exams, such as the TCAP. This alignment of exams will allow our team to gather robust data that is aligned to these exams to plan further support for students throughout the year. **Table 28** and **Table 29** detail the assessments Invictus will use in both our elementary school and middle school to gather data on progress towards our goals.

INTERIM ASSESSMENT	FREQUENCY	PURPOSE/DESCRIPTION
Invictus Nashville Charter School Application for Opening a Public Charter 2023		114 of 452

Math Cool Downs (Exit Tickets) (6–8)	Daily	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ Monitor progress toward mastery of state standards ▪ Grow children's testing stamina ▪ Provide data to inform teachers' lesson planning ▪ (TCAP)
TNReady (6–8)	Late Spring	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth/Performance) ▪ Required by state ▪ Assess progress toward mastery of state standards ▪ TCAP
TNReady Practice Tests: ELA + ELA/Writing, and Math (6–8)	#1: Late October/Early November #2: Late January/Early February	<ul style="list-style-type: none"> ▪ Predictive (Student Performance Readiness) ▪ Instructional (Student Performance) ▪ Prepare for practical life skill of test taking ▪ Inform ELA instruction ▪ Inform Math Instruction ▪ Monitor progress toward showing mastery to TNReady ▪ TCAP
Quarterly ELA and Math Assessments (6–8)	Quarterly	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ TCAP

Table 30 shows the assessments that will apply to both elementary and middle school. These tables display the assessment, when it is given, how often it will be given, and which end of year assessment or standard it is tied to. Success for our students begins with access, and we believe that demonstrating mastery on end-of-year state exams, such as the TCAP, grants them access to the opportunities of their choice. Therefore, much of our assessment selection is based on alignment to those EOY exams. We also have selected PBL modules to end with PBL summative projects to reach our mission of creating a diverse worldview, therefore, we also have assessments that drive global competence, and internal assessments that measure our success on our community impact.

Table 28
Elementary School Internal Assessments

INTERIM ASSESSMENT	FREQUENCY	PURPOSE/DESCRIPTION
Student Growth Portfolios* (Kindergarten)	Point A: Aug/Sept Mid-Year: Dec/Jan Point B: March	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth) ▪ Required by state ▪ Illuminate progress on state standards ▪ Inform math and ELA instruction ▪ Used by state as growth score for measure of teacher effectiveness (counts for 35% of Level of Effectiveness)
Montessori Phonics Assessment*	Every six weeks	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ Illuminate progress in mechanical path ▪ Compare growth to peers and other classes ▪ Inform literacy instruction
Math Quizzes (3–5)	Bi-weekly	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ TCAP ▪ Monitor progress toward mastery of state standards ▪ Grow children's testing stamina ▪ Provide data to inform teachers' lesson planning
TNReady (3–5)	Late Spring	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth/Performance) ▪ Required by state ▪ Assess progress toward mastery of state standards ▪ TCAP

Table 28, Elementary School Internal Assessments (cont'd)

INTERIM ASSESSMENT	FREQUENCY	PURPOSE/DESCRIPTION
TNReady Practice Tests: ELA + ELA/Writing, and Math (3–5)	#1: Late October/Early November #2: Late January/Early February	<ul style="list-style-type: none"> ▪ Predictive (Student Performance Readiness) ▪ Instructional (Student Performance) ▪ Prepare for practical life skill of test taking ▪ Inform ELA instruction ▪ Inform Math Instruction ▪ Monitor progress toward showing mastery to TNReady ▪ TCAP
Writing Assessment (1–5))	Every six weeks	<ul style="list-style-type: none"> ▪ Predictive (Student Performance Readiness) ▪ Instructional (Student Growth/Performance) ▪ Illuminate progress in writing skill ▪ Compare growth to peers and other classes ▪ Inform writing instruction ▪ TCAP
Quarterly ELA and Math Assessments (4–5)	Quarterly	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ TCAP

Table 29

Middle School Internal Assessments

INTERIM ASSESSMENT	FREQUENCY	PURPOSE/DESCRIPTION
Math Cool Downs (Exit Tickets) (6–8)	Daily	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ Monitor progress toward mastery of state standards ▪ Grow children's testing stamina ▪ Provide data to inform teachers' lesson planning ▪ (TCAP)
TNReady (6–8)	Late Spring	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth/Performance) ▪ Required by state ▪ Assess progress toward mastery of state standards ▪ TCAP
TNReady Practice Tests: ELA + ELA/Writing, and Math (6–8)	#1: Late October/Early November #2: Late January/Early February	<ul style="list-style-type: none"> ▪ Predictive (Student Performance Readiness) ▪ Instructional (Student Performance) ▪ Prepare for practical life skill of test taking ▪ Inform ELA instruction ▪ Inform Math Instruction ▪ Monitor progress toward showing mastery to TNReady ▪ TCAP
Quarterly ELA and Math Assessments (6–8)	Quarterly	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ TCAP

Table 30

Internal Assessments for all (K-8)

INTERIM ASSESSMENT	FREQUENCY	PURPOSE/DESCRIPTION
<p>NWEA MAP: Reading and Math (K-8)</p>	<p>Fall, Winter, and Spring</p>	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth) ▪ Illuminate growth ▪ Compare year-to-year growth ▪ Compare our students to national norms ▪ Demonstrates growth to our stakeholders and funders ▪ Potentially required for district accountability ▪ Universal Screener for RTI
<p>Aimsweb (K-8)</p>	<p>Fall and Spring RTI Interventions Weekly</p>	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth) ▪ Illuminate growth ▪ Compare year-to-year growth ▪ Compare our students to national norms ▪ Demonstrates growth to our stakeholders and funders ▪ Potentially required for district accountability ▪ Universal Screener for RTI
<p>WIDA ACCESS (K-8)</p>	<p>Early Spring</p>	<ul style="list-style-type: none"> ▪ Evaluative ▪ Required by state ▪ Evaluate the effectiveness of support for ELLs
INTERIM ASSESSMENT	FREQUENCY	PURPOSE/DESCRIPTION

<p>Math Cool Downs (Exit Tickets) (6–8)</p>	<p>Daily</p>	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ Monitor progress toward mastery of state standards ▪ Grow children's testing stamina ▪ Provide data to inform teachers' lesson planning ▪ (TCAP)
<p>TNReady (6–8)</p>	<p>Late Spring</p>	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth/Performance) ▪ Required by state ▪ Assess progress toward mastery of state standards ▪ TCAP
<p>TNReady Practice Tests: ELA + ELA/Writing, and Math (6–8)</p>	<p>#1: Late October/Early November</p> <p>#2: Late January/Early February</p>	<ul style="list-style-type: none"> ▪ Predictive (Student Performance Readiness) ▪ Instructional (Student Performance) ▪ Prepare for practical life skill of test taking ▪ Inform ELA instruction ▪ Inform Math Instruction ▪ Monitor progress toward showing mastery to TNReady ▪ TCAP
<p>Quarterly ELA and Math Assessments (6–8)</p>	<p>Quarterly</p>	<ul style="list-style-type: none"> ▪ Instructional (Student Growth/Performance) ▪ TCAP

Table 30, *Internal Assessments for All (K–8) (cont’d)*

INTERIM ASSESSMENT	FREQUENCY	PURPOSE/DESCRIPTION
Dibels (K–8)	Weekly or Bi-weekly	<ul style="list-style-type: none"> ▪ Evaluative (Student Growth/Performance) ▪ Instructional (Student Performance) ▪ Required by state ▪ Monitor progress in response to targeted intervention ▪ Provide data for determining educational disability
School Culture (K–8)	Bi-annual	<ul style="list-style-type: none"> ▪ Student, family, and faculty surveys
Global Competence (K–8)	Annual	<ul style="list-style-type: none"> ▪ Subsection of School Culture survey ▪ Adapted from PISA Global Competence ▪ Questionnaire
Social-Emotional Development (K–8)	Bi-annual	<ul style="list-style-type: none"> ▪ Badge work, documentation and student surveys
Community Impact (K–8)	Bi-annual	<ul style="list-style-type: none"> ▪ Community surveys, Learning participation and leadership

Alignment with School Curriculum, Goals, and State Standards

Alignment of our internal assessments is detailed in the tables above. We will tailor our internal assessment program to ensure all students are prepared for the TCAP exams. Each of our curriculum selections are aligned to state standards to ensure that they are consistently preparing students to demonstrate mastery on those exams. This assessment plan will ensure we have the information we need throughout the year to achieve our academic goals laid out in **Section 1.4** of this application.

We blend nationally recognized external assessments with internal assessments that are aligned with our curricular approach and school priorities. Ongoing and quarterly internal assessments including documentation of academic standards mastery, qualitative documentation of the learning process, PBL rubrics, and SEL surveys provide deep insights into students' daily work at Invictus Nashville. External assessments including standards benchmarking and progress monitoring tools provide a research-supported quality check to ensure that we are continuously making progress toward achieving high levels of mastery of state standards. Less frequent internally developed surveys on Global Competence and School Culture are administered to three groups of school stakeholders (students, families, and faculty) and ensure that we are achieving our Invictus Nashville outcomes in these areas.

Our internal and external assessments allow us to continuously monitor achievement and meet the needs of individual students, student cohorts, and sub-groups of students through our unique curricular model. Our elementary Montessori classrooms provide students with uninterrupted work cycles, and this is aligned to the project-based learning that occurs in the middle school. During this time one teacher provides small group and individual instruction to target learning needs as identified on internal assessments and external benchmarks. Meanwhile, remaining students are guided by the other teacher who captures documentation of academic mastery and SEL skills as the students' progress through individual work plans aligned with their learning needs. Reflection on classroom documentation and results of external exams allow teachers and Invictus leadership to identify trends in achievement and growth, as well as potential gaps in learning that need to be addressed for individual students, student cohorts, and sub-groups of students. The entire school participates in data collection and analysis and data-driven strategic planning, as explained in detail in the following application section.

1.7.C. Staff Responsible for Testing at Invictus

Data collection and analysis will be a full staff effort and priority at Invictus, so all teachers, leaders, and staff participate in data processes at the school. The Executive Director will take ownership of setting the vision and priorities for data collection, analysis, and action planning at Invictus. This vision will be carried out by the Director of Operations, who will own creating data systems to streamline processes for collection, disaggregation, and dissemination to staff to make data systems at Invictus efficient and teacher friendly.

Each Dean and/or Director (School Culture, Student Supports, and Academics) will own using big picture and longitudinal data for their buckets to identify trends, develop action plans, and plan and develop professional development to close gaps revealed in the data. Academic Deans at Invictus Nashville will be responsible for using individual teacher data to influence weekly meetings and lead reflection on these metrics. In the years before each Dean is hired, the Executive Director and Assistant Director will own data analysis and action planning for those buckets. The Director of Operations, with oversight from the Executive Director, will manage and coordinate all state and national testing such as TCAP, WIDA, and NWEA MAP—to ensure testing integrity, efficiency, and efficacy.

1.7.D. Data Collection and Action Planning

In addition to state and national assessments, the assessments outlined above will serve as the primary sources of data at Invictus for student success regarding standards mastery, social emotional development, and school culture. The following cycles will be used to collect, analyze, and action plan from data:

- 1. Initial Universal Screener and Bi-weekly Checkpoints.** A universal screener, such as NWEA MAP and Aimsweb, will serve as our first robust data collection of each school year. This data will be disaggregated to inform RTI groups for the first four weeks of the school year. Professional development will include a Grade Level Meeting. In this meeting there will be a standing agenda item to conduct a checkpoint on progress monitoring for RTI groups in that grade. Grade teams will be able to propose shifts in RTI groups, rooted in data, after these checkpoints to ensure that RTI groups are as responsive and effective as possible. Every nine weeks, students will be reassessed and restructured in their groups. This data cycle will run continuously throughout the school year.
- 2. Weekly Coaching Meetings.** Teachers will track daily data in the elementary setting, teachers will bring their observations notes and any trends from the student learning plans. In middle school, teachers will bring data from checkpoints within projects, math quizzes, etc. This data will be used to inform teacher support plans, and these metrics will be a regular agenda item at weekly meetings with their coach. These weekly coaching meetings will also serve as an opportunity for teachers to debrief any other data they have collected in their classroom. It will be an expectation that teachers bring data to their coach weekly, though this will be a mode of differentiation in professional development, as teachers will own the choice of that data set.
- 3. Bi-weekly Culture Pulse Checks.** Additionally, bi-weekly Grade Level Meetings will serve as culture pulse checks for each grade. As a team, they will be provided and analyze culture data for their grade team over a two-week period—attendance, punctuality, behavior intervention occurrences, family communication data, and other relevant metrics to assess the overall health of the grade level culture. This will give the team an opportunity to identify cultural gaps in their grade and action plan as a team to address those gaps regularly.
- 4. Bi-weekly Department Meetings.** Teachers will have opportunities to assess student growth and achievement on a continuous basis. This analysis will occur most regularly in a teacher’s department team. Teachers in elementary school will analyze student progress based on the Montessori scope and sequence, math quizzes, trends in learning plans, and any practice TNReady assessments. The middle school will analyze a set of project checkpoints, final products, math quizzes, quarterly assessments, and any practice TNReady assessments. The department team would then action-plan based on the trends identified and collaboratively make suggestions for each teacher to address current gaps or extend and stretch the current mastery level.
- 5. Tri-weekly Leadership Step Backs.** The leadership team at Invictus Nashville will conduct tri-weekly step back meetings at their weekly team meeting to holistically assess areas of success and growth for the school. The leadership team consists of the Director of Operations and Assistant Director until Year 3. After that point, the leadership team will include Deans, Director of Student Supports, and Director of Expeditions and Strategic Partnerships. This analysis will include academic, cultural, and operational data to ensure that the leadership team is viewing areas of growth with nuance and enough latitude to identify overlaps between areas of growth to plan the most dynamic and effective solution. The trends identified in these tri-weekly step back meetings will in large part inform the annual strategic planning that the leadership team engages in each summer. These triweekly step back meetings will also play a large part in planning weekly PD to address gaps identified, as well as focus areas for weekly coaching meetings with all teachers and staff.
- 6. Annual Strategic Planning.** Each summer, in collaboration with the Board of Directors, the leadership team will work to make goals for the following school year that are responsive to the achievement of

goals from the prior school year. This annual strategic planning process will be comprehensive—academic, operational, and cultural goals will be set during this time. The focus of annual strategic planning will be on using the momentum from the prior school year to take the school to the next level in all areas.

1.7.E. Data Analysis Training

At Invictus Nashville, we believe that data collection, analysis, and action planning is one of a great teacher’s most important tools. We know that building this skill is crucial to our success in achieving our ambitious and important academic and cultural goals. Because of this belief we will train teachers in collecting, analyzing, and acting on data sources in a variety of ways:

- 1. Daily Classroom Data Systems.** During Summer Teacher Academy (more details on Summer Teacher Academy can be found in **Section 2.5**) classroom teachers will spend time on alignment training to develop classroom data collection systems. When alignment training is complete, teachers will spend time working practically on what those systems look like in the classroom daily. This will manifest through training on developing and implementing the collection of student data, action plan in the moment to adjust live instruction, and plan for reteaching or spiral review in the next lesson. This training will also look like teachers practicing individualized coaching of students based on the informal data they collect during classroom work time. This training will continue in weekly coaching meetings as teachers bring data for analysis weekly, the weekly coaching provided by coaches are adjusted, and instructional shifts are made in response to classroom data. If necessary, more intensive one-on-one training will occur to make sure data is being collected in class daily with fidelity.
- 2. Summit Learning Projects Training.** Teachers who are in year 1 of using the Summit Learning Projects will attend a one-week training provided by Summit Learning. This training will provide the foundational training needed to implement the projects, provide differentiation, understand the cognitive skills rubric, and navigate the instructional platform. All other middle school teachers using the projects will refine those skills during Summer Teacher Academy on site at Invictus Nashville.
- 3. Unit Assessments.** Middle school teachers will spend time developing Unit Assessments during Summer Teacher Academy through a data lens—ensuring that their assessments are aligned to yearlong standards so that the data the assessment produces relevant and actionable. Additionally, teachers will receive data training in bi-weekly department meetings as they analyze work samples, unit assessment data in and PBL cognitive skill rubric review. This training will happen collaboratively through the department and led by coaches that are present in those meetings (the Executive Director, Deans, or department chairs).
- 4. Culture Data.** During Summer Teacher Academy and throughout the year in weekly coaching meetings, teachers will receive training on accessing, analyzing, and planning outreach based on culture data throughout the year. Teachers will be trained in the nuance and need in analyzing data surrounding attendance, punctuality, classroom behavior interventions, and family interactions and communication. They will also receive this development and training in bi-weekly grade level meetings led by either the Executive Director, Dean of School Culture, or a Grade Team Lead. This training will be on analyzing culture data on an individual and grade wide basis.
- 5. Community Surveys.** There will be bi-annual surveys given to students, families, and community members to assess our school culture and community impact. Teachers will receive training on disaggregating and using this data to impact their classroom practices, family outreach, and community service-learning planning during the school year.

The variety in the data collection provides differentiated opportunities for Invictus Nashville staff to develop as data analysts in many forms and contexts. This will allow all staff members at Invictus Nashville to work strategically and responsively to meet student and family needs as effectively and timely as possible in service of achieving our school goals. Our abbreviated schedule on Thursdays grants teachers time each week to adjust their instruction based on the data analysis they have conducted, and the area of focus will vary to allow teachers to use the influence of data in a holistic improvement of their practice. The broader approach to professional development is laid out in **Section 2.5** of this application.

Leader Training

Embedded in the success of this data analysis training plan is the training of our leaders at high levels to be able to support teachers in their data analysis systems and analysis growth. The Executive Director will meet this training need for leaders in weekly coaching meetings by ensuring that data analysis is a component of the weekly meeting for the relevant role—i.e., the Dean of Student Supports might bring data for analysis that is related to IEP goal monitoring while the Director of Operations might bring data related to lunch transition times and efficiency. Tailoring the context of data analysis to each leader’s role will equip them with the skills they need to turnkey this training to their teams. It will also keep data analysis training fresh and novel, ensuring that growth is constant.

1.8. School Calendar and Schedule

In this section:

- Provide the annual academic calendar for the proposed school as Attachment A.
- Attach the proposed school’s detailed daily schedule by grade. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies.
- Explain why the academic calendar and schedule will be optimal for student learning. Summarize how you will plan time for tiered interventions, enrichment, tutoring, and other academic activities.
- Describe any proposed extra-curricular or co-curricular activities or any other student-focused programming the proposed school will offer, including when will they begin, how often will they occur, and how will they be funded.
- If Saturday School, summer school, or after school will be offered, describe the program(s). Explain the schedule and length of the program, including the number of hours and weeks. Address the number of students and the methodology used to identify them. For identified students, is the program mandatory? What are the anticipated resource and staffing needs for these programs?

1.8.A. Annual Academic Calendar

The annual academic calendar is attached as **Attachment A**.

1.8.B. Daily Schedules and Instructional Minutes

Daily schedules by grade can be found in **Table 31** and **Table 32** for both elementary school and middle school. Core instructional minutes are included in each figure. We have a total of 180 days per academic year. To maximize student instructional minutes and ongoing teacher development, we have designed four full days of school Monday—Thursday with an abbreviated schedule on Fridays to allow an afternoon weekly for ongoing teacher professional development. We believe this schedule will be the most supportive of our mission by ensuring that excellent teaching is continually refined.

Due to the use of the Montessori curriculum in the elementary setting, the work cycles have specific priorities. For example, the morning work cycle would include the following:

- Trained Lead Montessori teachers will guide individual students through new lessons in small groups based on student readiness. These lessons range from letters and sounds to sensorial works that develop concentration and self-control. In between lessons, teachers (both leads and assistant teachers) observe children to see who needs more help, and who is ready to move on.
- Children choose the work they will practice based on the lessons the teacher has given them. Students return to work until they have mastered that skill.
- Student who need direct EL services and/or special education services will receive it during this time.

- The topics covered integrate hands-on experiences in language, math, geography, arts, music, and practical life.

The afternoon work cycles include the following:

- **Core Knowledge Language Arts:** “Listening and Learning”/ELA Seminar: This is held as a grade-level group session.
- **Math seminar:** A small group session where the teacher walks students through solving a challenging, grade-level math problem together; typically aligned to a Tennessee State Standard.
- **RTI/Enrichment:** Students are in tiered groups based on a universal skills assessment. They are working on filling gaps based on the data collected in class and ongoing assessments.
- **Classroom jobs:** Children develop responsibility by taking turns doing different tasks. These might include feeding classroom pets, watering plants, sweeping, preparing snacks, cleaning up after meals, and organizing materials. Our students may be stewards of a particular shelf of materials or a student ambassador who might meet guests.⁶⁶
- **Related Arts are noted as Electives in the schedule.** This time will also include related arts which will allow teachers to have planning periods as well. In elementary school, students will rotate between music and P.E. with embedded art included in the curriculum in Y1 to meet all required standards. After Year 1, we will add additional related arts based on student interest and state standards. This time will also include related arts which will allow teachers to have planning periods as well.⁶⁶

In the elementary school, our Monday—Thursday schedule includes 250 instructional minutes with an additional 190 minutes on our abbreviated Fridays. In middle school, the daily schedule includes 350 instructional minutes Monday—Thursday with an additional 225 instructional minutes on our abbreviated Friday.

Table 31

Elementary School Daily Schedule (Monday—Thursday)

7:45—8:00	15 MINS	ARRIVAL	
8:05—8:35	30 mins	Mentoring and Breakfast	
8:40—11:40	120 mins	Morning Work Cycle	Morning Work Cycle
11::40—12:40	60 mins	Lunch/Recess	
12:45—1:15	30 mins	Read Aloud	
1:20—3:00	100 mins	Afternoon Work Cycle*	Afternoon Work Cycle*
3:05		Dismissal	

Table 32**Elementary School Friday Schedule**

TIME	MINUTES	LOWER ELEMENTARY	UPPER ELEMENTARY
7:45—8:00	15 mins	Arrival	
8:05—8:35	30 mins	Mentoring and Breakfast	
8:40—10:40	120 mins	Morning Work Cycle	Morning Work Cycle
10:45—11:45	60 mins	Lunch/Recess	
11:50—1:00	70 mins	Afternoon Work Cycle*	Afternoon Work Cycle*
1:05		Dismissal	

Table 33**Middle School Daily Schedule (Monday—Thursday)**

TIME	MINUTES	COHORT A	COHORT B	COHORT C	COHORT D	COHORT E	COHORT F
8:00— 8:30	30 mins						
Arrival and Breakfast							
8:30— 9:00	30 mins						
Mentoring							
9:05— 10:15	70 mins	Math	ELA	Science	Math	ELA	History
10:20— 11:30	70 mins	ELA	Science	SDL/RTI	ELA	History	SDL/RTI
11:35— 12:05	30 mins						
Lunch							
12:10— 1:20	70 mins	Science	SDL/RTI	*Electives	History	SDL/RTI	*Electives
1:25— 2:35	70 mins	SDL/RTI	*Electives	Math	SDL/RTI	*Electives	Math
2:40— 3:50	70 mins	*Electives	Math	ELA	*Electives	Math	ELA
3:55							
Dismissal							

**Science and History alternate. Cohorts A-C will attend Science on Monday/Wednesday and History on Tuesday/Thursday. Cohorts D-F will attend History on Monday/Wednesday and Science on Tuesday/Thursday.*

**Electives are Related Arts. We will offer music, physical education, art, and computer science to start.*

**Schedule is based on having two Math, two ELA, one Science, and one History teacher per grade level.*

Table 34**Middle School Friday Schedule**

TIME	MINUTES	COHORT A	COHORT B	COHORT C	COHORT D	COHORT E	COHORT F
8:00— 8:30	30 mins	Arrival and Breakfast					
8:30— 9:05	35 mins	Mentoring					
9:10— 9:55	45 mins	Math Workshops	ELA Workshops	Science Workshops	Math Workshops	ELA Workshops	History Workshops
10:00 — 10:45	45 mins	ELA Workshops	Science Workshops	SDL/RTI	ELA Workshops	History Workshops	SDL/RTI
10:50 — 11:35	45 mins	Science Workshops	SDL/RTI	Electives	History Workshops	SDL/RTI	Electives
11:40 — 12:10	30 mins	Lunch					
12:15 —1:00	45 mins	SDL/RTI	Electives	Math Workshops	SDL/RTI	Electives	Math Workshops
1:05— 1:50	45 mins	Electives	Math Workshops	ELA Workshop	Electives	Math Workshops	ELA Workshop
1:55		Dismissal					

**Electives are Related Arts. We will offer music, physical education, art, and computer science to start.*

**Science and History alternate Fridays. For example, Cohort A-C will have Friday workshops in science one week then Alternate to History.*

**Schedule is based on having two Math, two ELA, one Science, and one History teacher per grade level.*

The Expedition schedule can be found in **Table 35** for elementary and **Table 32** for middle school. Expedition weeks happen every seventh week of the quarter. It allows for students to engage in the community to access different ways of learning. In addition, it aligns with our vision to help students become leaders in their community. This week also serves as exposure for our students so they can better identify their unique path in life. For our teachers, it will provide an opportunity to analyze data, collaborate, receive PD, action plan, and provide remediation for students.

Table 35**Elementary Expedition Schedule*, Monday—Thursday**

TIME	MINUTES	LOWER ELEMENTARY	UPPER ELEMENTARY
7:45—8:00	15 mins	Arrival	
8:05—8:35	30 mins	Mentoring and Breakfast	
8:40—9:40	60 mins	RTI/Workshops/Electives	RTI/Workshops/Electives
9:45—11:35	110 minutes	Expedition	Expedition
11::40— 12:40	60 mins	Lunch/Recess	
12:45—1:45	60 mins	RTI/Workshops/Electives	RTI/Workshops/Electives
1:50—3:00	70 mins	Expedition	Expedition
3:05		Dismissal	

**On abbreviated Fridays, after lunch/recess there will be a 30-minute read-aloud so that we start dismissal at 1:05.*

**Electives are Related Arts. We will offer music, physical education, art, and computer science to start.*

Table 36**Middle School Expedition Schedule*, Friday**

TIME	MINUTES	COHORT A	COHORT B	COHORT C	COHORT D	COHORT E	COHORT F
8:00—8:30	30 mins			Arrival and Breakfast			
8:30—9:05	35 mins			Mentoring			
9:10—11:10	120 mins		Expedition			Expeditions	
11:15—12:00	45 mins		RTI/SDL			RTI/SDL	
12:05—12:35	30 mins			Lunch			
12:40—2:40	120 mins		Expedition			Expedition	
2:45—3:50	65 mins		Workshops			Workshops	
3:55				Dismissal			

**On abbreviated Fridays, after lunch/recess there will either be 80 minutes of workshops so that we start dismissal at 1:55.*

1.8.C. Effectiveness of Calendar and Schedule**Academic Calendar**

Our academic calendar is structured deliberately to ensure that student learning is the focus. This begins with creating the safe and supportive culture we know kids need by starting each day with their one-to-one mentoring/mentoring groups. These opportunities will begin building trust and lines of communication that will be paramount to student success throughout the year. Mentors will be paramount as a point of contact for each family (more can be found in **Section 1.11**) Our year also begins with two weeks of staff PD through our Summer Teacher Academy to ensure that teachers are prepared for a strong start on day one of school. Teacher in-service happens during the Summer Teacher Academy. This ensures that dynamic learning begins on the first day of school, because teachers are well planned and prepared to execute the priorities and goals of Invictus Nashville. Invictus Nashville plans to align school holiday breaks with the district whenever possible because we believe this will create consistency for parents with childcare needs, especially if they have separate children attending both our school and a district elementary school. The students participate in student service days. This is part of the Community Service and Expeditions weeks. Throughout the school year we have created multiple opportunities for professional development to limit disruptions to the learning cycles. The majority of our data days are embedded into our expedition learning weeks. This activity schedule allows staff to take a step back, analyze assessment aligned data, and make critical adjustments to classroom instruction.

Daily Schedule

Our daily schedule prioritizes instructional time and reflects the mission and vision of our school. We believe in a deeply supportive environment, so we have built in a daily RTI block so that all students

receive the academic support they need. This can also look like enrichment for students that need an extra challenge. We believe in RTI for all as a core part of our schedule so that we can meet all student needs—remediation, acceleration, and enrichment. Our Friday abbreviated schedule will be used to make time for teacher development and data analysis.

In compliance with T.C.A. § 49-6-3004 e)(1) A local board of education or private or church-related school that exceeds the full six and one half (6 1/2) hours instructional time required by law by one half (1/2) hour daily for the full academic year shall be credited with the additional instructional time. The excess instructional time shall be accumulated in amounts up to, but not exceeding, thirteen (13) instructional days each year, and this excess accumulated instructional time may be used for early student dismissal for faculty professional development under rules promulgated by the board of education.

Please see our compliance table for the break of our schedule.

Table 37

Invictus Nashville T.C.A. § 49-6-3004 e)(1) Compliance Table

Invictus Nashville Minutes (Monday – Thursday)	7 hours and 20 minutes
Required Minutes per T.C.A. § 49-6-3004 e)(1)	6 hours and 30 minutes
Excess Minutes	50 minutes per day (M-Th) =200 additional minutes per week
# of Invictus Nashville Abbreviated Fridays	35 Fridays with 2 hour early dismissal = 70 hours
Not to Exceed 13 days per T.C.A. § 49-6-3004 e)(1)	13 days at the required 6.5 hours = 84.5 hours
Difference	= 14.5 hours.

Before and After Care

The school schedule is detailed above, and Invictus Nashville plans to offer before and after school care to accommodate parents' work schedules. We plan to partner with a community organization such as the Boys and Girls Club or Fun Company through the YMCA for this service. The projected schedule will be 7:00-8:00 a.m. for morning care, and 3:00-6:00 p.m. for after care. Before and After Care will be paid for by parents on a sliding scale with scholarships available. Spaces will be prioritized for low-income students and essential workers.

1.8.D. Extra-Curricular Programming

Extracurricular Clubs

Invictus plans to offer an engaging, responsive program of extracurricular programs that is directly informed by the interests of the staff, students, and families at our school. While we do not presently know the full roster of activities that will be offered until we recruit and consult with our founding staff, families, and students, the list below includes extracurricular clubs and activities that our proposed Executive Director has led or supported in previous roles that could be representative of options at Invictus Nashville:

- ◆ **Poetry Slam.** Students learn the academic components behind writing poetry as well as competition for students interested in performance.
- ◆ **Student Council.** Government structured club to understand how policies are formed and how they impact people and to support/plan activities for students, family, and the community.
- ◆ **Drama Club.** Fine arts production studio culminating in an after-school studio showcase.

Extracurricular clubs at Invictus Nashville may be offered by teachers or by a community partner on voluntary basis. Teachers and community partners will submit proposals and plans to the Executive Director for approval to start a club. Clubs will be required to meet at least bi-weekly to continue. We will aim to provide engaging extracurricular programming options beginning in Y1. Funding for clubs will operate on a sliding scale, with families paying club fees supplemented by the school offering need-based scholarships and community partners making donations for clubs to operate.

Extracurricular Sports

We believe that sports are an important part of the Nashville and Tennessee identity, so we propose a school that offers competitive sports programming. We also believe that sports are an important opportunity for students' holistic growth and development, as well as a driver of the cultural identity and health of a school community. We hope to provide a program that allows students the opportunity of choice in athletics. At scale, our goal will be to offer at least one competitive sports team for each gender each season. Our hope is to offer more than one each season so that our students are offered every opportunity they could gain elsewhere in our city, though we know that will largely be dependent on funding and facilities. Our lead founder has experience as a middle school athletics coach and can support the planning and implementation of these programs. Because of the logistics and costs associated with offering athletic programming, we will aim to begin our athletic program in Y6, with the founding class of middle school. However, we hope to offer sports as a club in Y4 and Y5. We will re-evaluate the sustainability of our athletic program in Y8 understanding that our model will depend on how large our athletic programming is able to grow based on funding, support, and facilities. We will fund athletics through fundraising, sliding scale costs for families, and donations from the community.

1.8.E. Extra School Days

Summer School

Invictus Nashville will offer summer school. Summer school will be free of cost for our families. We anticipate providing 3–4 weeks in the month of June. Summer school will specifically focus on transitions grades in elementary such as third grade and fifth grade. This is due to the mixed grade levels and the new third grade retention law. In addition, every grade in middle school will be considered. The schedule for summer school follows the Invictus Nashville Expedition School Day, generally 8:00 a.m.–1:00 p.m. with meals included. Based on staff interest and capacity, Invictus summer school may be provided by

Invictus teachers or by community partners. Teachers will be offered a stipend for their time and engagement.

In addition, there are two additional days that the district traditionally does not school that we have chosen to have in person. These days are Veteran's Day in November and President's Day in February. These days will serve as community service days for our community which is directly aligned with our mission and vision to ensure that students have a heart for service.

1.9. Special Populations and At-Risk Student

In this section:

- Describe the experience of the leadership team in working with special populations. What staff (by role and number), including support staff, does the proposed school plan to hire to address the needs of the special populations identified in subsections (c), (d), (e) and (f)?
- Describe the proposed school's plan to prepare for special populations. What adjustments will be made to the school's daily schedule to address the diverse needs of the students?
- Describe the following related to students with disabilities:
 - ◆ Methods for identifying students with disabilities and avoiding misidentification or overidentification.
 - ◆ Specific instructional programs, practices, and strategies the proposed school will employ to provide a continuum of services, ensure students' access to the general education curriculum, and ensure academic success for students with disabilities;
 - ◆ Plans for monitoring and evaluating the progress and success of students with disabilities, including coordination with the authorizer's monitoring and evaluation; and
 - ◆ Plans for promoting graduation for students with disabilities (high school only).
- Describe the following related to English Learners (EL) in accordance with State Board Policy 3.207:
 - ◆ Methods for identifying EL students and avoiding misidentification.
 - ◆ Specific instructional programs, practices, and strategies the proposed school will employ to ensure academic success and equitable access to the core academic program for EL students;
 - ◆ Plans for ensuring individual learning plans (ILPs) are maintained and addressed; and
 - ◆ Plans for monitoring and evaluating the progress and success of EL students, including exiting students from EL services.
- Describe the following related to at-risk students:
 - ◆ Methods for identifying at-risk students through academic and behavioral processes; and
 - ◆ How the proposed school will address the learning needs of at-risk students and monitor their progress. Specify the programs, strategies, and supports that will be provided.
 - ◆ Describe the following related to gifted students:
 - ◆ Methods for identifying and meeting the needs of intellectually gifted students, including specific research-based instructional programs, practices, strategies, and

1.9.A. Leadership and Staffing

Invictus Nashville believes deeply in making serving special populations and at-risk students a high priority. The Lead Founder/Executive Director of Invictus Nashville Dr. Brenda Jones has extensive experience serving EL students locally both as a classroom teacher and as an Assistant Principal. She has served on student support teams (s-teams), served as the administrator for IEP and 504 meetings. While receiving her master's degree in Curriculum and Instruction, Dr. Jones enrolled in elective courses that focused on meeting the needs of diverse learners and effective instructional strategies for students who are classified as ELL or receive support from an IEP or 504 plan. As a classroom teacher, she was designated as the newcomer math teacher. During this time, she was a Level 5 teacher because of the multi-year growth of her students. This experience and in-depth understanding of learner variability led to her passion for instructional approaches that are designed to meet the needs of all learners, like the uninterrupted cycles using the Montessori curriculum and Project Based Learning approach offered at Invictus Nashville. In addition, through her fellowship with the Build, Excel, Sustain Organization, which has partnered with the Nashville Incubator to prepare aspiring school leaders to meet the needs of exceptional learners, Dr. Jones will receive ongoing leadership support during the planning and launch of Invictus Nashville to ensure that equitably addressing learner variability is at the center of the learning program.

SPED Teachers and EL Teachers

SPED and EL teachers will coordinate inclusion efforts with lead content teachers in elementary school and general education teachers on each grade level in the middle school to ensure all special populations are receiving necessary services in every academic class. These teachers will co-plan weekly with academic teachers to communicate each team member's responsibilities in providing services during each lesson. Special Education and English Language Learner Teachers will be provided support in training and coaching teachers both on conducting these meetings effectively and in monitoring the success of the strategies and services being implemented.

Invictus Nashville will staff a SPED and/or EL certified teacher in each grade level. We will ensure that there are SPED certified teachers for every 20 special education students. In hiring we will also target academic content teachers who also hold SPED and/or EL certifications to bolster our support of special populations. Our partnerships will allow us to have access to a high-quality pool of applicants. We will hire an additional Special Educator in Y2, and beyond based on enrollment projections of our special populations. We anticipate enrollment that reflects surrounding schools, which enroll approximately 14% SPED students, so we will statistically enroll approximately 10 SPED students in each grade. The Invictus Nashville staffing plan includes one SPED teacher for at least every two grade levels at Invictus Nashville, which amounts to at least three SPED teachers in the Lower School and at least two in the Upper School. SPED teachers will coordinate the direct instruction and inclusion of students with IEPs. For the middle school, we anticipate at least one SPED teacher per grade level due to the increase in enrollment. SPED teachers will implement any modifications or accommodations in their classes in accordance with the students' IEPs.

In addition to specifically designated SPED positions, the two-teacher staffing approach at Invictus Nashville will target hiring classroom teachers who are EL-certified or SPED-certified to meet the needs of diverse learners through this specialization and deeper understanding of differentiation to meet the requirements of students' IEPs or ILPs. The Human Capital section of this application details the ways that classroom co-teachers will organize and assign responsibilities for delivering direct EL services and the general education program. This is detailed in more depth in **Section 2.4**.

Many students will be able to access the core instructional program without the support of a special education teacher or paraprofessional. In cases where students require additional instruction, scaffolds, or accommodations, these services will be delivered as indicated on the IEP by a special educator or by a

paraprofessional under the direct supervision of the SPED teacher. As a small school, to meet all requirements of all students' IEPs, including speech therapy or occupational therapy, we may hire part-time staff or may contract with external service providers. We have identified Project Play as the leading local organization for contracting these services in case the school should not have the capacity to provide them internally. If needed, Invictus Nashville will contract a school psychologist through Project Play to stay compliant with all Special Education laws and regulations regarding a psychologist and all occupational therapy to stay compliant with all laws and regulations regarding the valuation and re-evaluation process. Additionally, we are excited to partner with the MNPS EL coach and EE coach in order to ensure we fulfill all IEP/ILP compliance requirements.

Year 3: Director of Student Supports

The Assistant Director and Director of Operations will be hired in Year 1. The next leadership hire at Invictus Nashville will be a Director of Student Supports. The Director of Student Supports will directly coach all Special Education and EL teachers at Invictus Nashville, develop and lead professional development on serving special populations for all staff members, and ensure Invictus Nashville is in compliance with all applicable laws and requirements. They will manage all data tracking for students at Invictus Nashville who classify for services to ensure equitable access and outcomes throughout the school year. In hiring for this role, Invictus Nashville will recruit highly qualified applicants with SPED and EL certifications, a proven track record of success in leading teams towards student equity, and a belief in partnering with students' families. These responsibilities will be split between the Executive Director and Assistant Director in Years 1 and 2 of operation. The Executive Director and Assistant Principal will stay current on all laws and policies related to compliance pertaining to Special Populations through training and partnerships with the Tennessee Department of Education, the MNPS EE Coach, and EL Coach.

1.9.B. Overview of Invictus Nashville's Approach to Serving Special Populations

Every single student is unique. At Invictus Nashville, we reject the notion of a "typical student" and aim to approach each learner as a unique person with individual needs that it is our responsibility and privilege to meet daily. We will ground our approach to student support in three core beliefs:

1. Support for each student is everyone's job individually and collectively.
2. We are capable of meeting all learning needs; and
3. We are committed to innovation, malleability, and responsiveness through a problem-solving mindset to all student learning needs.

Students at Invictus Nashville will receive all necessary services in their grade level classrooms whenever possible through an inclusion model that always prioritizes the least restrictive environment. This will mean that all students with an IEP or ILP will receive their services within the context of the general education classroom with targeted interventions by a specialized provider. Using a fully inclusive model provides the opportunity for students to receive individualized targeted support and small group instruction within their general education classroom setting, which provides important academic, social, and emotional development benefits to both students with IEPs, ELs, and their peers. An inclusion model also clearly communicates to our staff, families, and community that we believe support for each student is everyone's job individually and collectively.

Invictus will design all student supports around the belief that we can meet all student needs. Adaptations and modifications of assignments, assessments, and environment will be provided as required by student IEPs, ILPs, and whenever else it is deemed beneficial for all learners at Invictus Nashville. Special assessment accommodations will be provided during all assessments as outlined in the IEP—state/district, as well as

interim internal assessments. We will provide authentic accountability measures to ensure we are frequently progress monitoring student goals and the efficacy of the supports we are utilizing.

We will provide LRE through inclusion in the general education setting to the fullest extent possible. However, we know that all students may not be successful in the general education setting without additional support. To ensure success of all students at Invictus Nashville, we will generally deliver services along the following multi-tiered continuum:

- General education with no services (may require accommodations or modifications)
 - ◆ All students will receive personalized high-quality Tier 1 instruction and behavior support provided by general education teachers.
- General education with additional supports
 - ◆ Students will receive personalized high-quality Tier 1 instruction, and additional instructional or behavioral support to address individualized IEP/ILP goals provided by general education teachers and support staff.
 - ◆ For example, additional instructional or behavioral supports (Tier 2, Tier 3, Gifted, IEP or ILP) will be provided by but not limited to the following: classroom teachers, SPED teacher, EL teacher, paraprofessionals, or related service providers through push-in support.
- Special education support in a separate classroom for a portion of the day
 - ◆ Students will receive personalized high-quality Tier 1 instruction, and additional instructional or behavioral support to address individualized IEP/ILP goals, provided by general education teachers and support staff.
 - ◆ For example, additional instructional or behavioral supports (Tier 2, Tier 3, Gifted, IEP or ILP) will be provided by but not limited to the following: classroom teachers, SPED teacher, EL teacher, paraprofessionals, or related service providers through pull out support. In all cases evidence-based resources will inform instruction in the special education setting,

Schedule Considerations

As previously described, the Invictus daily schedule and staffing structure are intentionally designed to provide flexibility in meeting the needs of all learners. In the elementary schedule, the work cycles are optimal times for interventions and enrichment to be provided by classroom teachers and specialists. In addition to strong Tier 1 instruction, the 2–3 hour work cycles will be planned and structured carefully, and students will be intentionally grouped to deliver Tier 2 or Tier 3 RTI services, EL, or Special Education services. In the middle school, the schedule has time for enrichment and/or interventions daily to support all students.

1.9.C. Serving Students with Disabilities

Methods for Identification

Invictus Nashville will provide a Free and Appropriate Public Education (FAPE) for all students within the Least Restrictive Environment (LRE) possible. We will comply with all special education requirements of the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act, and any other civil rights enforced by the U.S. Department of Education Office of Civil Rights. Likewise, we will fully comply with additional policies of the state of Tennessee and Metro Nashville Public Schools.

"Child Find" is the process of locating, identifying, and evaluating children with disabilities to ensure that they receive services to which they are entitled. For any student who is either known to have or is

suspected to have a learning disability, staff, and related service providers at Invictus will follow the protocols in place in MNPS to identify students who may be in need of special services. These protocols include providing students with routine screenings for vision and hearing, progress monitoring student performance and students' response to intervention (RTI). Children who are suspected of having a disability will be referred for screening, including forming a Support Team (S-Team), to match resources to student needs. The S-Team will include education professionals, school personnel, parents, and others who have special knowledge of the student. The Director of Student Support Services will oversee these processes, and prior to hiring this position these processes will be owned by the school Assistant Director in collaboration with SPED and classroom teachers.

The following steps are followed in the support of students who require intervention and do not currently have an IEP: 81

- 1. Universal Screener:** Students will be required to take the NWEA MAP universal screener. It will allow us to see how our students are performing nationally. They will also be provided the Aimsweb universal screener. AimsWeb allows for both skills and progress monitoring based on many identifying factors including dyslexia which is required by law as outlined in Public Chapter 1058. This universal screener will happen at the beginning of the year or when a student enrolls at Invictus Nashville. Teachers will review, analyze, and discuss student results to recommend placement for Tier 1, 2, or 3 interventions. The school will monitor student progress in both reading and mathematics.
- 2. Data-Driven Intervention:** Students who continue to have difficulty accessing the general curriculum will be given more intensive intervention. This additional instructional support may be in the form of one-to-one instruction (as applicable) smaller instructional groups in the general education classroom, intensive support from the intervention teacher, and/or a change in intervention programs. Parents will be notified of their student's academic or behavioral concerns via a Notice of Concern provided by their child's mentor teacher. School leadership, teachers, and other support staff in the process will engage the parents so that they are part of problem solving and discussing supportive educational options.
- 3. Evaluation:** Those students who need more educational support and who do not make sufficient academic progress after the above steps have been implemented or whose parents have requested a psycho-educational evaluation, may be referred for further evaluation through the MNPS's Department of Exceptional Education including Special Education and/or to their family physician for evaluation of a medical condition, such as ADHD. If the completed diagnostic shows that the student is eligible for special services or ADA support services, an IEP and/or a 504 Services Plan may be developed.

The universal screener process will include the identification of students with dyslexia as required by the "Say Dyslexia" Law of 2016 (TCA § 49-1-229). It is recommended by the state board policy that students with this identification receive interventions that are explicit, systematic, cumulative, multisensory, and language based, Invictus Nashville will comply with this recommendation for our identified students as listed in our plans for universal screeners.

Research has determined that students of color are subject to more severe discipline responses including suspension and expulsion and to the disproportionate rates of identification for special education services. Invictus Nashville has structures in place to avoid disproportionality in behavior responses or identification for special education through the use of data-driven systems to identify and evaluate the progress of students. We will respond to student needs through the implementation of research-based

81 Dowell, R. (2022). KIPP Southeast Nashville College Prep Elementary School. <https://www.tn.gov/content/dam/tn/tn-public-charter-school-commission/documents/charter-school-appeals/new-start-appeals/2022/kipp-se-el/ed.%20Clean%20Version%20of%20Amended%20Application%20-%20KIPP%20Nashville%20Elementary.pdf>

instructional methods and behavior systems. These include our positive discipline approach and character development process through mentoring described in detail in **Section 1.10** and data-driven instructional practices detailed in **Section 1.7**. A data-driven approach to identifying students with disabilities has been effective in Tennessee in preventing an over-identification of underperforming students whose needs simply aren't being met through classroom learning activities.⁸²

Students with 504 Plans

Section 504 requires schools receiving federal funds to provide students with disabilities appropriate education services designed to meet their individual needs to the same extent as the school meets the needs of those students without disabilities. The legislation also prohibits discrimination because of a disability. Invictus Nashville will adhere to all obligations prescribed by IDEA and Section 504. This will start with the evaluation and identification of any students protected under Section 504, including any student determined to: 1) have a physical or mental impairment that substantially limits one or more major life activities, 2) have a record of such impairment, or 3) be regarded as having such an impairment.

The Director of Student Support Services will serve as the Section 504 coordinator to ensure that the legal rights of such students are met and that their special needs are effectively served. The Assistant Director will assume this responsibility prior to hiring the Director of Student Support Services. The process for identifying and developing plans for students with 504 plans is the same as described above for IEPs. Monitoring of the 504 plans will be overseen by the student's classroom teacher or mentor. An Invictus classroom teacher will have approximately 24 students in their classroom, meaning statistically they will have two or three students who have an IEP or 504 plan in the class, with support and monitoring distributed across the two classroom teachers with the support of the Director of Student Support Services, SPED teacher, and Assistant Director. All the teachers will be provided training on our process during our Summer Teacher Academy. Prior to the hiring of the Director of Student Support Services, the Assistant Director will provide training as needed during our shortened day schedule or during PD during expedition weeks. Additional details of our training plan can be found in **Section 2.5 Professional Development**.

Specific Instructional Programs, Practices, and Strategies

Invictus Nashville will implement a fully inclusive model to provide all students with appropriate educational services in the least restrictive environment possible. Modifications and adaptations of assignments, assessments, and learning environment will be provided as indicated by a student's IEP or ILP. A fully inclusive model, by nature, pursues equity by giving all students a seat in the same classroom, and it is our responsibility to ensure that equity is truly pursued by providing access to rigorous, grade level learning opportunities to every student in a seat in our classrooms. By demonstrating a day-in life of a student at Invictus Nashville, we detail here additional key features of our instructional approach that ensure academic success for special needs students at Invictus Nashville.

Teachers will use their planning and grade level team meetings to ensure their lessons and planning represent inclusive teaching strategies that best support both EL and students with disabilities. These inclusive practices are aligned to SIOP and WIDA best practices. They will be centered on Equity, Integration, Collaboration, and a Functional Approach to Language. Teachers will also use a lesson plan template that requires the SIOP practices be utilized when considering their cohort of students. For example, teachers will determine language objectives and scaffolding based on the needs of students.

⁸² Aldrich, M. (2016). Tennessee's special education population is changing under its new academic intervention program. Chalkbeat. <https://tn.chalkbeat.org/2018/2/5/21104309/tennessee-s-special-education-population-is-changing-under-its-new-academic-intervention-program>

They will find ways to use authentic background knowledge from students and their own lives to connect to content. In addition, leadership will provide continuous opportunities for professional development to help grow their skill set on inclusive practices.

Table 38**Addressing Diverse Needs: Elementary School⁸³**

	SHAYLA—SPED TIER 1	SAM —ELL TIER 2	LEAD TEACHER	ASSISTANT TEACHER
7:45	Shayla is greeted by her teachers and classmates. A first grade student reads the morning message to Shayla and then she settles in with a book to read (SSR) as the rest of her class arrives and settles.	Sam is greeted by the Assistant Teacher (who is his designated mentor) at the door. A student buddy escorts Sam to the morning message board. Together they read the morning message, adding both of their responses to the prompt. They take note of the daily schedule and take out books for independent reading and settle in for SSR as the rest of the class arrives.	Teacher walks around, stopping to have individual reading conferences with students and records anecdotal notes in the record book.	Assistant teacher greets students at the door as they arrive
8:05	Shayla hears a bell rung by a classmate and takes that as a signal to put her book away and come to her mentor group. During the morning mentoring meeting, she participates in a greeting activity, learns about a new Habit of Success, shares news, and hears about the day's activities.	Sam is prompted by his mentor teacher to join the morning mentoring meeting where he participates in a greeting activity, learns about a new Habit of Success, shares news, and hears about the day's activities.	Teacher has prepared a lesson on a new Habit of Success and the continents. Class reviews what they remember and, together, label continents on class puzzle map. The teacher has animal figures to be matched to the continents and there is a class discussion about the pet guinea pig's origins in South America. The group is dismissed to work.	Teacher has prepared a lesson on a new Habit of Success. The class checks the attendance, does a group greeting, monitors and graphs the weather, does some stretches and sings The Continent Song. Teacher gives the class an overview of the day.

83 Sussex Montessori School. (2012). A Day in the Life of a Montessori Student. Delaware Department of Education. <https://de01922744.schoolwires.net/cms/lib/DE01922744/Centricity/Domain/151/FSMontAPPL2012.pdf>

Table 38, Error! Reference source not found. (cont'd)

	SHAYLA—SPED TIER 1	SAM —ELL TIER 2	LEAD TEACHER	ASSISTANT TEACHER
8:40	Shayla consults her work plan and chooses to do math work first. She finds a place to work near her friend, Marcus, and some prepared math problems from a shelf.	Sam chooses a slicing banana “practical life” work, after slicing the fruit he carefully offers some of his classmates a serving as he waits for his EL teacher to come in the classroom.	Teacher gathers a group of five children for a language/reading lesson. The children bring their reading book to a small rug on the floor for the lesson. The EL teacher pushes into the class and based on their ILP provides direct instruction to Sam for 3) minutes but will return in the afternoon work cycle for an addition 30 minutes that will equate to a full hour of direct services per law.	Teacher helps the children settle into their work choices and offers any necessary clarification or guidance. She then takes note of the choices the children have made on a class record sheet. If a particular challenge is noted by the teacher, note is made of that on the individual child's record sheet.
9:10	Having finished her first work choice, Shayla consults her work plan and chooses to work on the story she had begun the day before. When Teacher 2 invites her to a lesson she puts a card out where she was working: Shayla is working here.	Sam is prompted to consult his daily work plan and chooses to do his daily journal entry in his Draw and Write notebook. The Lead Teacher encourages him to use spacing between his words as he phonetically encodes his ideas.	The Lead Teacher monitors the individual choices the children are making and keeps records thereof and of any challenges, anecdotes, or questions she notes about individual children. She checks work completed thus far in the morning.	The Assistant Teacher invites Shayla and the rest of the Kindergarteners for a lesson on making a "hemisphere map." The group reviews the continent names and locations and is then shown how to trace, perforate out, and glue puzzle pieces together to make one's own continent map. These are art skills embedded into the content.
9:40	Shayla is now very interested in making a hemisphere map. She sees that "work" is already taken, and settles back into her writing.	Sam gets out his word study work and begins to use manipulatives to spell 3-letter short vowel words and then write them in his word study notebook.	Teachers confer briefly about what they have noted thus far in the morning.	

Table 38, Error! Reference source not found. (cont'd)

	SHAYLA—SPED TIER 1	SAM —ELL TIER 2	LEAD TEACHER	ASSISTANT TEACHER
10:10	<p>Shayla invites Marcus to join her and the two of them have snacks. They serve themselves, chat quietly, and then get a sponge and clean up their snack spot. Shayla sees that the continent's work is now available and hurries to take it from the shelf and begin work. She carefully places the puzzle piece of Africa on a green piece of paper and traces around it. She places the trace on a thick felt map and uses a perforating tool to make holes all along her pencil line very close together. When she has perforated the outline of Africa, she carefully tears it out and excitedly gets up to show Teacher 2 what she has done. She then begins work in Europe.</p>	<p>Sam participates in a group guided reading lesson focused on using context to aid in his decoding process. After the lesson, he goes off with a peer to “Buddy read” a familiar, repetitive text to one another, each having an opportunity to practice both listening and reading skills.</p>	<p>The Lead Teacher calls the first of a succession of small groups over for a leveled reading group or literature circle.</p>	<p>The Assistant Teacher provides Sam a group guided reading lesson focused on using context to aid in his decoding process. After the lesson, he goes off with a peer to “Buddy read” a familiar, repetitive text to one another, each having an opportunity to practice both listening and reading skills.</p>

Table 38, Error! Reference source not found. (cont'd)

	SHAYLA—SPED TIER 1	SAM —ELL TIER 2	LEAD TEACHER	ASSISTANT TEACHER
10:40	Shayla puts away the continent work, having perforated three of the continents and put them into her work cubby to be added to later. Her work plan consulted, she selects a "word box" from the language shelf and begins to build three-letter phonetic words with movable letters to spell the names of the objects in the box. The Lead Teacher stops by her work.	Sam is prompted by the Assistant Teacher to do a follow- up math activity from a lesson the previous day. Sam begins to complete his 3-digit addition work with a partner.	The Lead Teacher sees Shayla's work and sits down at her mat. She goes through the objects with her and asks Shayla to close her eyes. She moves the objects around and Shayla laughs and puts them back with the words they match. The Lead Teacher asks Shayla to read the words she has spelled and then Shayla says she'll write them, too. The Lead Teacher moves on.	Sam is prompted by the Assistant Teacher to do a follow-up math activity from a lesson the previous day. Sam begins to complete his three-digit addition work with a partner.
11:10	Shayla is invited to a place value math lesson with the Lead Teacher. She brings her math notebook to the lesson.		The Lead Teacher invites a group of children to a place value lesson involving "golden beads" and "the stamp game."	
11: 40	RECESS/LUNCH			
12:45	Shayla listens to the teacher read.	Sam listens to the book and participates in the class discussion.	The Lead Teacher reads aloud a nonfiction text about the life cycle of a Monarch butterfly. She asks the essential question "What is a life cycle" and the class participates in a discussion.	

Table 38, Error! Reference source not found. (cont'd)

	SHAYLA—SPED TIER 1	SAM —ELL TIER 2	LEAD TEACHER	ASSISTANT TEACHER
1:20	Shayla attends music class for her related arts.	Sam attends physical education for related arts.	The Lead Teacher gives the kindergarteners a lesson on the life cycle of the Monarch butterfly and uses the continent map to show the Monarch's migration.	The Assistant Teacher makes sure the classroom is ready for dismissal upon the students' return. The remainder of the time is used to confer with the Lead Teacher regarding the day and tomorrow's lessons
2:20	Shalya and all Tier I students are provided an extension activity	The EL teacher returns to provide additional direct instruction for Sam and other students based on their ILP.	Teachers monitor their groups as they do the follow-up science activity, offering assistance and guidance when needed.	The Assistant Teacher makes sure the classroom is ready for dismissal upon the students' return. The remainder of the time is used to confer with the Lead Teacher regarding the day and tomorrow's lessons.
2:55	Shayla, Sam, and their class come to circle for a reflection of the day's discussion and good-bye song then collect their belongings and follow dismissal procedures.	Shayla, Sam and their class come to circle for a reflection of the day's discussion and good-bye song then collect their belongings and follow dismissal procedures.	Teacher leads the closing meeting and dismisses the children.	

Table 39

Addressing Diverse Needs: Middle School

	KEVIN TIER 2	CHRISTINE TIER 3	LEAD TEACHER
8:00	Kevin is greeted by different members of the school leadership team as he walks to his locker and the cafeteria for breakfast. Kevin's mentor teacher greets him when he enters the classroom to assess his mood to engage in academic learning for the day.	Christine is greeted by the school counselor upon arrival. Christine eats with the counselor and completes a series of behavioral modification activities to support a strong launch to the school day. A student buddy escorts Christine to her mentoring classroom to start the day.	Teacher is preparing for their mentoring sessions and reviewing notes on their mentees. The teacher greets all students as they arrive for mentoring.
8:30	Kevin is paired with a buddy to complete the lesson on the new Habit of Success by his mentor	Christine is put into a small group to complete the lesson on the new Habit of Success with the assistance of a paraprofessional special education teacher.	Teacher has prepared a lesson on a new Habit of Success. Teacher prepares students for their self-direction learning and goal setting. The teacher mentors two or three kids one-on-one after the remainder of the mentee group is set for their SDL.

Table 39, Error! Reference source not found. (cont'd)

	KEVIN TIER 2	CHRISTINE TIER 3	LEAD TEACHER
9:05	<p>Kevin transitions to his math class. After completing the launch notes with the teacher's guidance, he is put into a differentiated group to complete a set of activities based on the notes. The teacher rotates to provide prompts and support as needed.</p> <p>Having finished his group work Kevin and the rest of the class come together to synthesize their learning, review the homework, and complete their cool down (exit ticket) before preparing for their next class.</p>	<p>Christine is provided to fill in the blank notes to complete the launch notes. She is provided one-to-one support on differentiated activities from the teacher or an aide in the room.</p> <p>Having finished her work Christine joins the rest of the class to come together to synthesize their learning, review the homework, and complete their cool down (exit ticket) before preparing for their next class.</p>	<p>Teacher provides launch notes and uses data to differentiate groups as needed for Tier 1 and 2 students.</p> <p>Teacher is prepared or prepares aide to provide 1-1 support for Tier 3 students.</p> <p>The Lead Teacher monitors the children during work-time and keeps records of and of any challenges, anecdotes, or questions she notes about individual children. She checks work completed to help with the synthesis at the end of the class period</p>
10:20	<p>Kevin transitions to English. Kevin reviews the objectives for the class time and provides the students with different reading selections based on their Lexile level.</p> <p>Kevin is now very interested in cars and decides to continue to read a book provided by the teacher.</p> <p>As he works, the teacher completes quick CFUs that helps him complete the associated theme PowerPoint for his final presentation on the cars book.</p>	<p>Christine reads a book about kites based on her Lexile level.</p> <p>As she reads, she makes a list of words she does not understand to get support from the teacher.</p> <p>When she is finished with the book, the teacher provides Christine with a pre-planned template of a PowerPoint to get started on her theme presentation. The pre-planned template has prompts to help Christine organize and connect to the book she has just completed.</p>	<p>The teacher prepares the pre-planned template for all Tier 3 students.</p> <p>The teacher prepares targeted questions and CFUs based on the reading selection for all students to help with an efficient circulation.</p>

11:35	Kevin and Christine attend lunch with their peers.	Kevin and Christine attend lunch with their peers.	N/A
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Table 39, Error! Reference source not found. (cont'd)

	KEVIN TIER 2	CHRISTINE TIER 3	LEAD TEACHER
12:10	<p>Kevin goes to Science which is his favorite subject.</p> <p>After the teacher reviews the science lab expectations, Kevin gets to work with his group.</p> <p>The teacher only has to provide prompts to keep Kevin on task and to ensure that he completes the lab worksheets.</p>	<p>Christine is pulled in a small group of three to five students to complete the lab with the teacher and/or an aide.</p> <p>The lab worksheet is completed as a group with support of peers and a teacher/aide.</p>	<p>The Lead Teacher uses data to create small groups for the lab during class.</p> <p>The teacher leads the group and/or prepares the aide during planning to make sure that they can support the small group during class.</p> <p>the teacher prepares targeted questions and CFUs for circulation after supporting Tier 3 students.</p>
1:25	<p>Kevin reports to his RTI class. Based on the NWEA MAP assessment, Kevin is receiving small group support to fill in gaps in his learning for English and/or Math.</p> <p>After receiving direct instruction, Kevin is provided an option to complete work using Aimsweb or independent reading.</p>	<p>Christine reports to his RTI class. Based on the AimsWeb assessment</p> <p>Christine is receiving one-on-one support on her phonemic awareness and grade-level vocabulary.</p> <p>Christine and the teacher read several passages using close reading strategies.</p>	<p>Lead Teachers take a break. Intervention teacher prepares lessons using RTI strategies and resources based on the Tiers.</p>

Table 39, Error! Reference source not found. (cont'd)

	KEVIN TIER 2	CHRISTINE TIER 3	LEAD TEACHER
2:40	Kevin attends P.E. for related arts.	Christine attends art for related arts.	Planning Period.
3:55	Kevin and Christine collect their belongings and follow dismissal procedures.	Kevin and Christine collect their belongings and follow dismissal procedures.	Teacher dismisses the children.

Plans for Monitoring and Evaluating

Accountability within our multi-tiered framework comes through the ongoing, regular documentation and monitoring of data through the RTI Module on Infinite Campus, which is available to charter schools in MNPS. Fidelity to implementation of interventions as well as monitoring of their efficacy will be achieved through this tracking system, which will inform needed adjustments to interventions including moving students to more intensive interventions or exiting students from interventions. This tracking system will be analyzed by grade level teams at monthly RTI meetings. The information collected at the grade level team meetings will be provided to the S-Team or IEP Team so that they have the data and documented evidence to make a data-informed decision about the student tiers. Data-informed decisions regarding students' instructional tiers will be made only at the conclusion of a quarter by the S-Team or IEP team.

All Invictus Nashville students will be monitored throughout the year using a universal screener, benchmark assessments (middle school), as well as ongoing classroom observations and/or assessments to track performance and growth. In addition, students with disabilities and 504 plans will receive regular progress monitoring of learning goals as determined by their IEP or ILP. Classroom evaluations will be adapted or modified appropriately to reflect the individual goals of students with disabilities and success within the Invictus Nashville instructional program will be evaluated in relation to these goals. This suite of monitoring and evaluation tools and strategies will ensure that we continuously support all students in achieving mastery and growth. The S-team or IEP team, including education professionals, school personnel, parents/guardians, and others who have special knowledge of the student will engage in annual IEP review meetings or more frequent review meetings as needed or requested by guardians.

1.9.D. Serving English Learners

Invictus Nashville will follow the latest policy, State Board Policy 3.207 of 2021 and T.C.A. § 49-1-302; 42 U.S.C. § 2000d; the English as a second language (ESL) policy, setting the minimum standards for Tennessee school districts in providing services to non-English language background (NELB) students who are also limited English proficient (LEP). Elsewhere in this application these students are referred to as English Learners (ELs). Upon enrollment, the school will identify whether a student is an EL by checking the registration information which includes a home language survey. Each parent will be given the home language survey to determine the predominant language spoken in the home. If the assessment indicates a home language other than English, the child will be classified as NELB and annually assessed for English proficiency using the WIDA ACCESS Assessment—all students will also sit for this exam annually to assess bilingualism progress, and this will serve the dual purpose of removing any stigma that exists around having to sit for an additional exam yearly. If a student is found to be an active EL in another district, Invictus Nashville will not re-assess them. If Invictus Nashville does not receive documentation from another district, the school will administer the WIDA W-APT (kindergarten) or the WIDA screener (Grades 1-4). Unless an NELB student enters the district with documentation of having achieved Fluent English Proficiency (FEP) in all four domains of language (reading, writing, listening, and speaking) in a previous district, the school district must assess the student for English proficiency using a state approved assessment within 30 days of enrollment. Currently, the initial screening instrument is the WIDA-ACCESS Placement Test (W-APT). Those NELB students who score below 4.5 on composite or 4.0 or below on any domain shall be entered into the ESL program, and ESL services will be provided. ESL programs are those “especially designed for speakers of other languages” [Tennessee Rules and Regulations, Rule 0520-1-3-.056. a. 1 and 2 ii.].

Staffing and Instructional Practices

Invictus Nashville will adhere to state policy and staff an average of one EL-certified learning specialist for every 35 EL students. We will support teachers in continued professional learning to acquire this certification to maintain an adequate balance of EL certified teachers to support our ELs at Invictus. Based on our enrollment projections and the demographics provided for District 4, we project to have at about 13 students that required EL services per grade level. We will hire an assistant teacher that is EL certified and who can manage ILPs and provide direct services to students based on their ILP. These numbers also ensure that we will not exceed the teacher/student ratios.

Nashville. While elementary courses will have a lead and assistant teacher to lead individual and small group instruction or interventions based on expertise and experience, in the case of EL students' service delivery we will ensure that these services are delivered by a certified EL teacher. For example, during the afternoon work cycle in an elementary classroom, an EL certified teacher will be responsible for delivering content based EL services implementing best practices described below. Although middle school does not have a two-teacher model, there will be time for a certified EL teacher to provide services for students during designated blocks.

ELs work toward mastering the same academic standards as native English-speaking students. Additionally, ELs have an ILP with specific language goals that are tracked and updated approximately each quarter. In general EL-certified classroom teachers are responsible for implementing ILPs, tracking, and updating goals through monitoring of classroom learning activities. Teachers are supported in this work by the Director of Student Support Services and prior to that hire the Assistant Principal as well as ongoing professional development described below. All Invictus Nashville teachers will engage in annual WIDA standards training required by MNPS as well as training on the Sheltered Instruction Observation Protocol (SIOP) Model, a research-based model designed to support teachers in systematically and simultaneously teaching ELs grade-level academic content and academic language.

Researchers have found SIOP methods to be effective with both EL and native-English speakers, and particularly for those students who are still developing academic literacy skills.⁸⁴

In addition, the SIOP focus on cross-curricular vocabulary development helps to provide extensive and varied vocabulary instruction that is critical for the academic development of all students, and especially for ELs. The SIOP method comprises eight main components listed below:⁸⁵

1. **Preparation:** Teachers plan lessons carefully, paying particular attention to language and content objectives, appropriate content concepts, the use of supplemental materials, adaptation of content, and meaningful activities.
2. **Building Background:** Teachers make explicit links to their students' background experiences and knowledge, and past learning, and teach and emphasize key vocabulary.
3. **Comprehensible Input:** Teachers use a variety of techniques to make instruction understandable, including speech appropriate to students' English proficiency, clear academic tasks, modeling, and the use of visuals, hands-on activities, demonstrations, gestures, and body language.
4. **Strategies:** Teachers provide students with instruction in and practice with a variety of learning strategies, scaffolding their teaching with techniques such as think-alouds, and they promote higher-order thinking through a variety of question types and levels.

⁸⁴ Echevarría, J., Vogt, M. E., & Short, D. (2008)

⁸⁵ Short, D. J. (2017). How to Integrate Content and Language Learning Effectively for English Language Learners. *Eurasia Journal of Mathematics, Science and Technology Education*, 13(7b), 4237-4260. <https://doi.org/10.12973/eurasia.2017.00806a>

5. **Interaction:** Teachers provide students with frequent opportunities for interaction and discussion, group students to support content and language objectives, provide sufficient wait-time for student responses, and appropriately clarify concepts in the students' first language, if possible and necessary.
6. **Practice and Application:** Teachers provide hands-on materials and/or manipulatives, and include activities for students to apply their content and language knowledge through all language skills (reading, writing, listening, and speaking)
7. **Lesson Delivery:** Teachers implement lessons that clearly support content and language objectives with appropriate pacing, while students are engaged 90-100 percent of the instructional period.
8. **Review and Assessment:** Teachers provide a comprehensive review of key vocabulary and concepts, regularly give specific, academic feedback to students, and conduct assessment of student comprehension and learning throughout the lesson.

The SIOP method will be incorporated in all content areas to ensure that all students, and particularly ELs, attain high levels of academic literacy in English. We will blend the Sheltered English Instruction approach with Content-Based English Instruction. This is another practice recommended in the English as a Second Language Manual from the Tennessee Department of Education.⁸⁶ Students develop key language skills, such as the ability to ask and answer questions, through the context of the academic content they are studying. This intentional, intensive language focus will benefit not only ELs, but all students at Invictus Nashville in achieving literacy in both English.

Evaluation of English Language Process

In addition to the annual assessments given to all Invictus Nashville students, EL students will take the WIDA each spring until they exit the assessment. Data on school-based assessments will be disaggregated for EL students (in addition to disaggregating data by race, gender, etc.) to measure the longitudinal progress of EL students in comparison with that of their native English-speaking peers within our program.

Classroom teachers will engage in ongoing data analysis in weekly coaching meetings and will engage in strategic planning around achievement and growth data at least quarterly throughout the school year. Teachers will continuously address achievement and growth gaps through the implementation of research-based differentiation strategies and scaffolds related to teaching practices including comprehensible input, or practices for assessing student competencies across the WIDA domains.

1.9.E. *Serving At-Risk Students*

Previous sections of this application covering our Academic Plan (**Section 1.3**) and Academic Performance Measures (**Section 1.4**) include our implementation of the RTI² framework. To be successful in serving struggling students well, they must be identified quickly and reliably. The RTI² approach will allow us to identify students who need special education services, students who are at-risk of academic failure but do not qualify for special education services, and gifted learners. Dibels will be used for foundation literacy skills for students that are in Tier III and SPED. For our Tier III and SPED students will monitor using Dibels very week. We will use AimsWeb for our Tier II students. Interventionists administer a progress monitoring probe every two weeks. An RTI data team will meet every four or five weeks to review progress. If a student is in Tier 3 interventions and is not making progress or making limited progress, he/she will be referred for evaluation for special education services.

⁸⁶ English as a Second Language Manual, Tennessee Department of Education, Updated 2018

Invictus Nashville will follow a similar procedure for a behavior RTI or students not responding to strong Tier 1 behavioral strategies including our implementation of Responsive Classroom positive behavior program and our one-on-one weekly mentoring sessions. First, the school will form an S-team to create a support plan with specific behavioral interventions. The team will execute the intervention plan for four to six weeks in Tier 2 while collecting data on the targeted behaviors. If the behavior does not shift, the student will be moved to Tier 3 behavior support. The student will get a new plan with increased supports and scaffolds. If a student does not meet the goals in the intervention plan, he/she will be referred for an evaluation and/or consent will be obtained to conduct a Functional Behavior Assessment. Invictus Nashville intends to create Behavior Intervention Plans in situations when a school team needs more support with crafting a plan.

As with our multi-tiered academic framework, accountability within our multi-tiered behavior framework comes through the ongoing, regular documentation and monitoring of data through the RTI Module on Infinite Campus, which is available to charter schools in MNPS. Fidelity to implementation of interventions as well as monitoring of their efficacy will be achieved through this tracking system, which will inform needed adjustments to interventions including moving students to more intensive interventions or exiting students from interventions, as determined by formal RTI data meetings every four or five weeks. A data-driven approach to identifying and monitoring students with behavior interventions, coupled with the relationship-based and restorative discipline practices employed at Invictus Nashville, will serve to avoid disproportionality in behavior responses as well as foster strong relationships and a culture of care and support between students and staff within the school.

1.9.F. Serving Gifted Students

The universal screener employed in our RTI² process will identify gifted learners in the same way that it identifies students in need of academic intervention. Classroom performance, quarterly reading and math benchmark assessments, and outside testing initiated by parents will be additional metrics used to identify gifted learners. The continuum of services outlined previously applies to gifted students as well, who may have their needs met in the general education classroom without additional support, may have their needs met in the general education setting with additional support or accommodations to differentiate in alignment with the IEP, paraprofessional, or may have their needs met through services delivered outside of the general education classroom by a specialist from one of our established partnerships during a portion of the school day.

The Invictus Nashville academic program is designed to meet the needs of all learners, and this includes gifted learners. The project-based learning model and the Montessori curriculum provides ample opportunities to differentiate learning content, context, processes, and products to meet the individual needs of all students. Both approaches give students many opportunities to stretch their thinking by chasing lines of inquiry that go beyond the Tennessee academic standards. The RTI block embedded in the daily schedule for all students also serves as a time for students who are high performing to stretch their thinking in deep, conceptual ways. Furthermore, our expedition-learning model will be a unique opportunity for students to make real world, contextual connections between their learning in the classroom and the areas of need they are seeing in the community.

1.10. School Culture and Discipline

In this section:

- ◆ Provide as Attachment B the Student Handbook and/or forms that will be provided to or required of students and families.
- ◆ Describe the desired school culture or ethos of the proposed school and how it will promote a positive academic environment and reinforce the school’s mission, goals, and objectives.
- ◆ Explain how you will create, implement, and sustain this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter mid-year.
- ◆ Explain how the school culture will embrace special populations, including students with disabilities, English Learners, and students at risk of academic failure or dropping out.
- ◆) Provide the student discipline policy as Attachment C (if not already included in Attachment B of the school handbook).
- ◆ If not addressed in the student discipline policy, describe the philosophy for student discipline that supports the proposed school’s model, including:
 - ◆ Practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior;
 - ◆ A list and definitions of the offenses for which students in the school must (where nondiscretionary) and may (where discretionary) be suspended or expelled, respectively; procedures for due process when a student is suspended or expelled as a result of a code of conduct violation, including a description of the appeal process that the school will employ for students facing expulsion;
 - ◆ An explanation of how the school will protect the rights of students with disabilities in disciplinary actions and proceedings;
 - ◆ The job description and qualifications of the administrative individuals responsible for carrying out the school’s discipline policies; and
 - ◆ How students and parents will be informed of the school’s discipline policy.

1.10.A. *Student and Family Handbook*

A draft of Invictus Nashville’s Student and Family Handbook can be found in **Attachment B**.

1.10.B. *School Culture*

School culture at Invictus Nashville will be driven through a commitment to our mission which is to help students identify their unique path to personal and professional success and be equipped with the necessary

habits of success to do so when they leave our school. This mission is tied to our four core values: Community, Character, Competence, and Collaboration. These will guide our establishment of a positive school-wide safe and supportive culture that is rooted in a deep enjoyment and excitement around learning, a celebration of difference, a commitment to and understanding of collective responsibility, and an excavation of and alignment of all actions and choices to character values and beliefs. This safe and supportive culture will all be in service of establishing a school environment where students never question their value, their worth, their power, and the immense amount of support they have available to them at Invictus Nashville. To accomplish this safe and supportive culture, we will partner with families to provide consistency and congruence in expectations, desired outcomes, and processes for continual growth and holistic development in alignment with restorative practices.

“Restorative practices are processes that proactively build healthy relationships and a sense of community to prevent and address conflict. A student’s day at Invictus Nashville will be specifically designed to accomplish this culture. Students will be greeted each morning by their assigned mentor, and they will have conversations about their lives as humans. The mentoring experience at Invictus Nashville is intentional and directly tied to our mission; “helping students have their unique path to personal and professional freedom.” Every K–8 student will start every day with their mentor house. These houses will be led by a mentor and will not be bigger than 12 students. At Invictus Nashville, we will communicate to students that they are people first when they show up at Invictus Nashville, and it will also give us an opportunity to catch any unmet needs in the first moments of a student’s day to get them the support that they need as soon as possible. As students enter their mentor house, they will experience a mixture of character and habit building activities based on their development needs. For elementary students, this could include whole group understanding on the different habits of success, team building activities, and/or one-on-one personalized support. In middle school, this will range from having informal conversations with their mentor that demonstrate intense care over holistic student development— “Which Habit of Success are we working on this week? Did you touch base with Mr. Zackery to schedule some time for extra support on your forces in motion project? These conversations will permeate Invictus Nashville spaces—mentoring, classes, hallways, the lunchroom, at arrival and dismissal. Students will be inundated with personalized attention and care to reinforce the safety they experience at Invictus Nashville. In class, teachers will be heard shouting out peer collaboration, students taking scaffolds they need to access content, and students exercising habits of success values in moments of challenge. We intend for this consistent and personalized support to help students face challenges, explore their passions, and determine their definition of success for life in a safe environment.

A culture that promotes a positive, supportive, and productive environment

At Invictus Nashville, we aim to foster productive school culture, which takes balancing a strong and supportive academic culture with nurturing students. Focusing solely on one versus the other, will fail to provide for children a well-rounded community of support. This is the reason that at Invictus Nashville, rigorous academics and a supportive culture are dually essential and connected to each other. We will work hard to establish values and systems that maintain our positive and productive school culture for students, faculty, and families.

Our positive, supportive, and productive culture will start with our one-to-one mentoring program. Teachers will have a small cohort of students that they will have a deeply personal relationship with throughout the school year. This small cohort creates their mentor house. Acting as their guide to academic success and social and emotional development, students are guaranteed to have a person on campus that they feel safe with as they face challenges and experience success. This will be accompanied by an adult culture of being committed to high quality teaching that is student centered. Learning will always be front and center to all that we do, and our students learn more deeply in an environment that is predictable, consistent, and safe (physically, psychologically, emotionally, and mentally). To that end, we will dedicate ample teacher planning and practice time to developing and honing proactive measures and moves to foster a space where all students can access exciting learning opportunities. Students will

understand and take ownership over their agency as learners. They will not only celebrate their successes in the classroom, but they will understand how they got there as well, prepared to replicate that success in new contexts. We will prioritize collaboration in the classroom to create an environment where children believe their learning is enhanced and more meaningful when they are learning alongside and from their peers.

A culture that reinforces Invictus Nashville’s mission, goals, and objectives

This positive and productive culture will allow us to accomplish our mission by creating a learning environment where the learning is student centered. It will be free from disruption and distraction with a unifying belief in collective responsibility. We will build and leverage the connection to communities we are immediately a part of and communities we are more largely a part of and build in structures and routines that teach reflection and growth as an iterative process of understanding our values and developing our character. Community, Character, Competence, and Collaboration are at the root of our mission, and at the root of our culture. These four values will live in all aspects of the design of Invictus Nashville to ensure that all parts of our model drive towards the fulfillment of our mission. The supportive nature of our culture will ensure equitable outcomes are a reality at our school by ensuring that student needs are consistently met. We know that to accomplish equity for all, we must build a culture where students can show up as they are and know their needs are going to be met.

1.10.C. *Creating, Implementing, and Sustaining School Culture*

Creating a positive, productive, and supportive school culture

Our approach to creating and maintaining positive, productive, and supportive school culture has been guided by our approach to strategically develop students' social and emotional faculties by prioritizing the Habits of Success and emphasizing a set of pedagogical principles to pursue our whole child outcomes. We will give students language that equips them to articulate their emotions and engage in a curriculum that emphasizes risk taking in learning to solve problems and understand the world and the relationships that exist within the world. Invictus Nashville has developed a set of Social and Emotional Development Practices to provide specificity to otherwise abstract ideas.

- ◆ We will provide and help develop the use of language to articulate emotions and feelings in the context of classroom learning to promote belonging and safety for all.
- ◆ We will provide tools and strategies to build and manage relationships through collaborative opportunities, self-awareness and empathy building practices, and a cycle of planning, reflection, and adjustment.
- ◆ We will model constructive reflections, interactions, and investigations of interactions within self and with others.

Implementing a positive, productive, and supportive school culture

We will create, implement, and sustain a positive, productive, and supportive culture for students through emphasis on our one-to-one weekly mentoring and the connection to social and emotional development practices in the curriculum and classroom. These practices are connected to our mission to help students find their unique path to personal and professional freedom. These embedded practices will bolster the individualized support provided in their one-to-one mentoring and create a school culture that can transfer outside of the Invictus Nashville building. **Table 40** elaborates key aspects of our culture and its approach.

Table 40**Social and Emotional Development Practices for Students and Teachers**

Posture	<p>The attitude or “inner place” from which a teacher orients themselves in the classroom with their students is evident in our approach. Our approach explicitly and implicitly points to a deliberate mindset with which a teacher approaches their students from a holistic perspective. This shift draws the attention of the teacher to the overall well-being of the student.</p> <ul style="list-style-type: none"> ▪ Autonomy-Supportive Teachers ▪ Present Teachers ▪ Humble Teachers ▪ Open-Minded and Receptive Teachers
Language	<p>Invictus Nashville will provide students and teachers with language for sharing feelings, reactions, feedback, and includes the Habits of Success and definitions as a tool for supporting dialogue. Aligned language is a critical ingredient to promote initial understanding and fuel for the burn.⁸⁷</p> <ul style="list-style-type: none"> ▪ We must be careful with the overuse or inauthentic use of language related to the Habits of Success. Having either a shallow grip of what the Habits of Success mean, or inserting them into dialogue, text, and teaching can result in the opposite of our intended exposure and lead to Habit of Success fatigue. ▪ The Habits of Success must be used in authentic contexts with care and intention. ▪ We must never use Habits of Success to criticize. habits of Success are assets and come to students from an asset based position. ▪ Actions speak louder than words but actions and words together send the clearest message of all.⁸⁸

⁸⁷ Van Gelder, T. (2005). Teaching Critical Thinking: Some Lessons from Cognitive Science. College Teaching.

⁸⁸ Duckworth, A. (2020). Preach What You Practice. Character Lab. <https://characterlab.org/tips-of-the-week/preach-what-you-practice/#:~:text=What%20this%20research%20suggests%20is,your%20words%20to%20your%20actions.>

Table 40, Error! Reference source not found. (cont'd)

Reflection	<p>Self-reflection is a way of guarding against self-ignorance and can assist in social and emotional development. While there can be disadvantages to over reflection. Our approach supports students as they develop self-reflection practices alongside learning.</p> <ul style="list-style-type: none"> ▪ Self-reflection can help students develop a mental model of who they are, learning about what makes them curious, what reactions they have in different situations and what fears exist. Awareness of these beliefs in self build accurate and positive perceptions of self. ▪ Self-reflection can help to highlight thoughts and distortions that mone many not even recognize to be true.⁸⁹ This awareness is beneficial to realign thinking and promote social and emotional growth. ▪ Reflection on intellectual ability and growth edges provides students with tools to practice autonomy over their learning as they become aware of their limitations and abilities. ▪ Metacognition allows for students to monitor learning progress. Metacognition improves knowledge in three areas: strategic knowledge, task knowledge, and self-knowledge.⁹⁰ Knowing things about self allows for better judgment and decision making.
Understanding	<p>Understanding is a way of knowing, not a thing to know itself. It is the deep knowledge of a topic or idea beyond the facts or information presented. It includes a contextual knowledge, connections to larger learnings and an explanatory graph of concepts. Our approach will provide opportunities to be metacognitive throughout their learning and emphasizes deep knowledge of concepts, skills, and ideas.</p>
Practice/Routines	<p>It is necessary for students to practice Habits of Success without fully mastering them, and in fact, this is beneficial. Our approach will emphasize the recurrence of practice through routine and practices that demonstrate virtuous living and contribute to possession of those ideas. Social and emotional development require the emphasis of 3 elements of the Habits of Success: the skill, the motivation, and the judgment for use. We prioritize these 3 pillars in instructional practices/routines that exist in our curriculum and approach to culture.</p>

⁸⁹ Porter, S. (2016). *Intellectual Virtues and Education: Essays in Applied Virtue Epistemology: A Therapeutic Approach to Intellectual Virtue Formation in the Classroom*. Routledge

⁹⁰ Pintrick, P. 2002. *Theory into Practice: The Role of Metacognitive Knowledge in Learning, Teaching and Assessing*.

Table 40, Error! Reference source not found. (cont'd)

Modeling

Modeling is directly correlated to the motivation component of Habits of Success development. We seek to provide an educational experience that reorients the mind away from transactional learning, the depositing of information from teacher to student and a shift towards personal connection and relational intimacy. Our curriculum supports students in their development as we prompt teachers to model their own development. We support the teacher with three key models to benefit students and drives toward their own growth:

- **Intellectual Humility:** awareness of and comfort with intellectual limitations and mistakes and eagerness to learn from others, including students.
 - **Intellectual Thoroughness:** having a firm command of an idea and articulating fine-grained details of thinking. A desire to ask why and probe to know more. Teacher modeling of curious thinking and exploration as a foundation for learning.
 - **Curiosity:** thoughtfully asking insightful questions and demonstrating a true desire to know more by wondering and thinking aloud.
-

At Invictus Nashville, we uphold these cultural practices through policies, and structures described in previous sections about our academic program and one-to-one mentoring as well in later sections about our approach to discipline at Invictus Nashville. Our environment will allow students and teachers the space to focus on learning. This will translate into academic excellence and healthy social and emotional development. Our student-centered approach and supportive nature of our culture will ensure equitable outcomes are a reality at our school.

Communities of Professional Practice for Teachers

The positive, safe, and productive culture for our staff will be grounded in the Habits of Success. The seven habits we are prioritizing developing among our staff are as follows: Sense of Belonging, Agency, Executive Functioning, Growth Mindset, Relationship Skills, and Self-Awareness. Utilizing these six habits, we will nurture human development for adults in the building. This is paramount as they are leading our students to become the best versions of themselves. We believe that by developing the intellectual and cultural capital of our staff, it will positively impact teacher practice, organizational culture, and student academic and social outcomes.

Table 41 explains key aspects of each Habit of Success for Invictus Nashville’s professional culture along with practices and structures that will foster these habits at Invictus Nashville. Many of these explanations will be found in greater detail in the section of the application addressing Human Capital and Professional Development.

Table 41**Invictus Habits of Success of Staff Culture**

HABITS OF SUCCESS	SUPPORTING INVICTUS PRACTICES AND STRUCTURES
Sense of Belonging	<ul style="list-style-type: none"> ▪ Hiring practices target mission and vision aligned, asset based thinking, academic focused, and commitment to continuous growth. ▪ Annual PD to revisit and realign on Invictus mission and vision.
Relationship Skills	<ul style="list-style-type: none"> ▪ Mentoring students and building relationships with their families fosters vulnerability and connection. ▪ Two-way coaching conversations provide feedback from the bottom up and from the top down so that all voices are heard and valued.
Agency	<ul style="list-style-type: none"> ▪ Teachers influence instructional decisions as part of the professional learning community. ▪ Teachers experience autonomy in implementing our curricular approach as long as achievement targets are met.
Growth Mindset	<ul style="list-style-type: none"> ▪ Data will focus on trends in addition to class and grade-level specific trends. Teachers will collaborate to strategically plan a response to data. ▪ Teachers share a collective responsibility to our students and will have to be reflective to plan with a purpose and provide appropriate support.
Executive Function	<ul style="list-style-type: none"> ▪ Broadly shared leadership opportunities. ▪ Leadership development pathways for staff seeking school leadership opportunities and/or those that plan to stay in the classroom but want to take on additional responsibilities.
Self- Awareness	<ul style="list-style-type: none"> ▪ Teachers work collaboratively with their co-teachers (elementary) and grade-level teams (middle). ▪ All staff will have a mentor coach and engage in frequent, ongoing support of their practice.

Communities of Engagement for Parents

The first lesson a child learns is from their own family. The cultural experience of the students can greatly influence their success within the educational institution. It is important that we deeply know our students and the community that we serve, and we view parents as essential partners in our work at Invictus Nashville. Our design has been based on community input, which has included a diverse set of stakeholders in District 4. Our school culture vision, Student and Family Handbook, and Discipline Policy are reflective of that input, and it guides the environment that we plan to create for students, families,

teachers, and administrators. During our planning year, we will continue gathering this input. We are excited by the opportunity to continue to invite the Donelson/Hermitage/Old Hickory community into our design process in support of our responsive school culture.

At the beginning of the year, we will be intentionally focused on getting families welcomed at our school. We believe establishing a face-to-face touch point with every family in the first few weeks of school is crucial to the partnership we hope to build with each family. Families will be introduced to their mentors during summer orientation and throughout the first few weeks of school because we know this partnership is imperative for holistic student success and growth.

Focusing on School Culture from Day One

Our school culture is foundational DNA at Invictus Nashville. Our school culture is embedded in our mission and vision, our family recruitment and engagement strategy and practices, our hiring methods, and the design of our academic program and school day. Families who select Invictus Nashville are signing up to be a part of our positive, productive, and supportive culture. Students will experience our culture from Day One through our student-centered curriculum and one-to-one mentoring program.

Teachers will engage in a robust summer orientation as well as continuous professional learning in support throughout the year. Students will participate in orientation during the first week of school to learn about the unique aspects of our academic program and school culture. Through our mentoring program and classroom activities, they will receive ongoing support incorporating character education and a student-centered environment.

Ensuring Strong Culture for Students Who Join Mid-Year

Staff and students who enter mid-year will engage in a similar orientation to ensure they quickly adapt to unique aspects and systems of our culture and will benefit from the ongoing support and continuous learning built into our model. We will prioritize establishing strong family partnerships from day one of enrollment with having family mentoring meetings. A strong family partnership will allow us to extend our school culture beyond our school day by ensuring we are aligned with the family in the growth and development of their child. In acclimating a new student midyear, we will lean on their mentor group as a welcoming team. These students will understand our commitment to our norms and the Habits of Success, and they will take ownership of modeling for the new student. In the upper grades, they will provide a new student a school tour and answer questions. The leadership team will support by consistently following up with new students and new families during their first quarter.

Sustaining a positive, productive, and supportive school culture

Families are vital in defining, shaping, and establishing a safe and supportive school culture and they are essential to maintaining that culture through feedback that is unique to their perspective. On the same schedule as our student satisfaction survey, we will elicit feedback from families through a bi-annual family satisfaction survey. We will continue to iterate and edit this survey as we develop. We will also informally collect family satisfaction data through our mentoring program throughout the year and through our open-door policy that allows families to share feedback at any point during the year. In addition, we plan to support the sustainability of our school culture throughout and between school years using the two methods below.

Phoenix Meetings

Invictus Nashville will host quarterly Phoenix Meetings which are opportunities for our students, families, and community. Phoenix meetings are focused on special topics, current events, and community

building. These quarterly meetings will give our school an opportunity to address any cultural gaps at Invictus Nashville. These quarterly meetings will be core to our school identity.

Invictus Family Council (IFC)

Invictus Nashville will offer open membership to our IFC to all family members of current Invictus students. This council will provide insight, feedback, and planning input on all Invictus priorities, policies, and events. The IFC will meet as often as their officers elect to, but they will be guaranteed two meetings each quarter with the leadership team present to build in collaboration and conversation between the IFC and the leadership team. Officers will include a chair, vice-chair, and secretary, and they will be elected by the current members of the IFC.

1.10.D. A School Culture for ALL

School culture at Invictus Nashville is grounded in being productive, safe, and supportive. This is inspired by the Habits of Success which at base focuses on healthy development tied to secure attachment. We believe that our school culture will support all students—students with disabilities, English Language Learners, students at risk for academic failure, or any other subgroup. Core to our mission at Invictus Nashville is to “support all” learners to find their unique path to professional and personal freedom and we take that responsibility seriously. Our focus on mentoring, individualized support of student development ensures that all students—with all types of assets and needs—are given the support they need and the support they deserve at Invictus Nashville. We will set the tone that our community will have unique needs academically, socially, emotionally, physically, etc., and that it is our school culture that will allow every member to have those needs met.

In addition to our approach to engaging all stakeholders in our school culture, we will highlight specific ways in which our culture systems provide equitable engagement for special populations:

- All students at Invictus Nashville will participate in our mentoring program with their peers and their one-to-one mentoring sessions. This will allow them to form close relationships with both adults and their peers. This will also be the Tier 1 support that students who are at-risk will receive to find the root cause of their challenges and to help the leadership team provide timely support.
- Our Montessori curriculum and two teacher model classrooms in the elementary setting will ensure they receive the appropriate and timely academic support. In middle school, all courses will have push-in support from EL and Special Education specialists. Students will receive the appropriate pull-out support and English Language Learners. There will also be intervention daily based on student needs.

1.10.E. School Discipline Policy

The Invictus Nashville Discipline Policy can be found in **Attachment C**.

1.10.F. Philosophy of Student Discipline

Our approach to student discipline is grounded in the base of the Habits of Success around Healthy Development. The base level habits are secure attachment, self-regulation, and stress management. We believe that when student needs are proactively met by an environment that is both safe, productive, and supportive the need for traditional behavior management is drastically diminished. We also know that all people make mistakes, and all mistakes are opportunities for growth. These beliefs inform our proactive approach to student discipline that is bolstered by systems of reflection, restoration, and relationships.

Many of our design elements will serve the purpose of decreasing the likelihood of student behaviors. For example, mentoring, student autonomy in their learning, expedition learning based on interest, and a two-teacher model in elementary school and relevant projects in middle school. However, we are aware that student misbehavior will arise. We believe that an approach to student discipline that is clear, consistent, and fair is imperative to maintaining a strong school culture. Community input has been an integral part of our planning and application process. The continuation of those efforts will ensure our approach to discipline is grounded in community values and needs as well as making our approach transparent to the community. Our Student and Family Handbook as well as our Discipline Policies will be available on our website, subject to annual review, and provided to prospective students and families prior to enrollment.

Mentor House System

Invictus Nashville will use a Mentor House System to incentivize positive behavior through Mentor Houses using Kickboard in middle school and ClassDojo in elementary school. The house system will build and sustain positive school culture in a way that also builds community across grade levels. The system provides students opportunities to earn points for their house which is their mentor group from academic achievement, positive community contributions, evidence of growth in character development, and many other avenues. Students will also earn points for their mentor group anytime they earn a Phoenix quarterly award, or character badge as explained below. One of the house system's best attributes is its adaptability—points can be focused on any identified gaps in school culture. For example, points can be dedicated to a specific core value of the school or adjusted for special events. Points are accumulated throughout each quarter, and there is a mentor group party at the end of each quarter to celebrate the winning house.

Phoenix Quarterly Awards

Invictus Nashville will honor students quarterly to celebrate the work that students are doing. We will honor 8 students per grade-level (one male, one female) that align to each of our core values: Collaboration, Competence, Community, and Character. All awards will be voted on by the grade team teachers except for the Community Award. Our Collaboration will go to students who have taken multiple opportunities to work with their peers without prompting and who have consistently demonstrated leadership skills while working. Our Competence award will be given to students that are taking risks by asking questions and seeking answers to those questions. Our Community award will be based on student nominations and it will honor a student who has gone above and beyond in our commitment to the community—helping a peer with an assignment, staying late to help a teacher prepare a science lab for the next day, volunteering to work with a community partner or at a school sponsored event, etc. Finally, our Character award will go to students who have shown special dedication to their growth and development around their Habits of Success. In addition to these awards, we will celebrate attendance, honor roll, and other academic or school specific achievements.

Character Badges

Each week Mentor House will nominate a peer to receive a character award based on specific habits of success with specific examples for the nominations. Each week the mentor will review the nominations and give the student a temporary character badge for the week. After receiving a nomination for a specific habit five times, the student will be put into the running for a permanent character badge that they can wear on their school uniform. In addition, the school will have a display wall that has the student's name and picture on it.

Responding to infractions

We believe in proactively preventing misbehavior instead of being reactive. We plan to do this by establishing a safe, productive, and supportive environment, however we understand that growth and development includes making mistakes. **Table 37** shows our general approach to student misbehavior. We will characterize misbehavior as either consequential infractions or inconsequential infractions. We believe in using the least invasive approach and to give students developmentally appropriate chances to correct misbehavior and logical consequences when they fail to do so. We will continue to develop this approach in collaboration with the community and families to maintain alignment. Teachers will be trained during summer professional development, teacher PLCs/PDs throughout the year, and weekly with their coaches as needed on student misbehavior and responses to those behaviors to establish an environment that is consistent and predictable for students and families. This consistency and predictability will establish a level of trust between stakeholders.

Table 42

Invictus Nashville Response to Student Misbehavior

INVICTUS NASHVILLE RESPONSE TO STUDENT MISBEHAVIOR	
<p>Inconsequential Infractions i.e., talking during instruction, not following teacher directions, off task behavior</p>	<p>Infraction #1</p> <ul style="list-style-type: none"> ▪ Least invasive intervention given the behavior. For example—proximity, redirection, pause and glance, positive narration. <p>Infraction #2</p> <ul style="list-style-type: none"> ▪ Verbal redirection. <p>Infraction #3</p> <ul style="list-style-type: none"> ▪ One on one teacher check-in at the most immediate break in instruction. <p>Infraction #4</p> <ul style="list-style-type: none"> ▪ Parent phone call. <p>Infraction #5</p> <ul style="list-style-type: none"> ▪ Leadership team intervention ♦ Examples include: Wrap-around Support such as counseling, referrals for a s-team, Detention, In-School Suspension, Out of School Suspension, Expulsion.
<p>Consequential Infractions i.e., cursing towards another community member, bullying(both in person and cyber), unsafe use of materials</p>	<p>Infraction #1—Leadership team intervention</p> <ul style="list-style-type: none"> ▪ Examples include: Wrap-around Support such as counseling, referrals for a S-team, Detention, In-School Suspension, Out of School Suspension, Expulsion.
<p>Consistent days of the following:</p> <ul style="list-style-type: none"> >3 minor infractions in >1 class; >2 Major infractions during a week; >3 Major infractions during a quarter 	<p>There are repeat behaviors that will initiate a greater intervention plan at Invictus Nashville. This could include the following:</p> <ul style="list-style-type: none"> ▪ Immediate mentor meeting that includes the student’s family, mentor, and the leadership team. ▪ A designed behavior plan that lays out clear targets tied to appropriate rewards that are identified by the family and school staff. ▪ A community mentor to offer support and guidance that transcends the school and family supports.

Discipline Systems

Invictus Nashville will implement the MNPS Discipline Policy which is consistent with our relationship- based and responsive classroom approach. To foster productive school culture, we also incorporate elements of Responsive Classroom. Many of these policies, such as daily Mentoring Meetings are like the daily Morning Meetings that are also part of the MNPS Discipline Policy.

Details about the Invictus Nashville Discipline Policy including elements drawn from the MNPS Discipline Policy can be found in **Attachment C**. We have adopted and will implement the Responsive Classroom Discipline Framework as displayed in **Table 43**.

Table 43

Responsive Classroom Framework

COMPONENT	GOALS	PRACTICES	NOTES
Invictus staff will lay the foundation for positive behavior.	The goal is to create and maintain a positive learning community and to teach students self-regulation.	<p>Example teaching practices:</p> <p>Collaborative activities that include the following:</p> <ul style="list-style-type: none"> ▪ Establishing rules and expectations collectively ▪ Setting goals ▪ Envisioning, reinforcing, and reminding language ▪ Structured reflection 	Self-regulation is one of the foundational Habits of Success. It promotes positive relationships, a positive school climate, academic achievement, self-worth, and healthy emotional wellbeing.
Invictus staff will be proactive in preventing off-task behavior and misbehavior	The goal is to teach students how to translate the rules and expectations into behavior by being, firm, fair, and consistent.	<p>Example teaching practices:</p> <ul style="list-style-type: none"> ▪ Modeling ▪ Role-playing ▪ Structured reflection ▪ Proximity ▪ Visual cues ▪ Proactive envisioning, reinforcing, and redirection 	The High-quality teacher-student, mentor-student, and student-student relationships contribute to a classroom and school climate in which students choose appropriate behavior out of respect for the teacher and one another.
Invictus staff will respond to off-task behavior and misbehavior	The goal is to help the student get back on track, repair any damage caused, and develop self-discipline so as to prevent similar problems in the future.	<p>Example teaching practices:</p> <ul style="list-style-type: none"> ▪ Proximity ▪ Visual cues ▪ Reactive reminding and redirection ▪ Logical consequences: Loss of privilege; ▪ Positive Time-out 	The Invictus Nashville staff communicates behavior expectations clearly and impose logical consequences.
Invictus staff will participate in solving a chronic behavior problem	The goal is to ensure that students get the right support at the right time that we understand the student's particular behavior problem and address it to get the student back on track.	<p>Example teaching practices:</p> <ul style="list-style-type: none"> ▪ Mentor problem-solving conference ▪ Individual written agreement 	Many of the discipline practices used generally work with students with chronic behavior problems. The practices need to be frequently and systematically, with the involvement of parents, mentors, counselor, and school leadership.

Suspensions

Our discipline policy is designed with the guidance of the Metro Nashville Discipline Policy. Invictus Nashville will only use suspensions for behaviors that jeopardize the safety and support of other community members. Suspensions will be reserved for behaviors and infractions where exclusion from the community is our only option to maintain an environment for all learners that is both safe and supportive. We will use both in-school and out-of-school suspensions. The days will be determined based on the severity of the behavior we are addressing. A suspension decision may only occur through the school leader (Executive Director until school principals are hired). Families will be notified of a suspension by either a phone call or a one-on-one meeting with the school leader, and they will always receive written notice detailing the incident, cause for suspension, and the time of the re-entry meeting.

Re-entry meetings will be required for all out-of-school suspensions. Y1 and Y2 this meeting will be with the Executive Director, while starting in Y3 this meeting could occur with either the school principal or the Dean of School Culture. Reentry meetings will largely mirror the layout of our intervention plans. We will consider all mandates of student rights prescribed by their disabilities, IEPs, Section 504 plans, or any other outlined special needs, accommodations, or modifications. We will also consider the impact their suspension has had on their academic progress, and we will collaboratively develop a plan to maintain their academic growth.

Expulsions

Invictus Nashville will reserve expulsions for students whose actions result in an ongoing or serious danger to the physical safety and wellbeing of other community members of our school. Invictus Nashville will uphold the zero-tolerance policy for all identified actions established by the MNPS Discipline policy. Expulsion will be employed as an absolute last resort at Invictus Nashville, and we will only use this option after we have offered all wrap-around support and interventions. An expulsion may only be initiated by the school principal with approval of the Executive Director, and the process must include a meeting with the student's entire support system which include their mentor, family, and school leadership. A hearing must be held with the school leader and parent or guardian present. A student who is expelled will be afforded full due process under Tennessee state law which will include the following (subject to legal review and Board approval): The school leader follows standard disciplinary policies and procedures for investigating the facts, obtaining witness statements, and ensuring adherence to due process procedures. Investigations will be conducted within 48 hours of an incident, with a written report and expulsion decision made within 72 hours. If the school leader determines expulsion is necessary, the student will be expelled.

Students with Disabilities

Invictus Nashville will comply with all laws and regulations, including IDEA and Section 504 of the Rehabilitation Plan of 1973 when applying our discipline policy to students who qualify for special education services. This will ensure that we are adhering to all accommodations and modifications in a student's IEP or 504 plan. Any time a student who qualifies for special education services is subject to disciplinary action their case manager and any managers of related services will be present to help develop an intervention plan that is informed by their IEP or 504 plan. If a student reaches greater than four days of suspension in a quarter, 10 days of suspension in a school year, or a single suspension that is five days or greater, we will initiate a manifestation meeting. The outcome of that process will determine the best course of action for the student.

Ownership of Discipline

Invictus Nashville will build a community of ownership for all aspects of school culture among all staff members. Disciplinary Action includes input from mentors and opportunities from their other teachers. In Y1 and Y2, the proposed Executive Director and Assistant Director will manage all discipline actions. Y3, the proposed Executive Director will onboard and train a Dean of School Culture to take ownership over discipline at Invictus Nashville. The Dean of School Culture will receive ongoing coaching from the Executive Director and will participate in development opportunities outside of the school as well. All families will be informed of our Discipline Policy prior to the start of school as part of our enrollment process but a select cohort of families will vet the process and provide insight in alignment with our commitment to parent involvement and the community. The policies established are in a living document that will be improved as we grow and develop to and become more responsive to community and family needs and values.

1.11. Recruitment and Enrollment

In this section:

- Provide as Attachment D the proposed school’s Enrollment Policy, which should include the following:
 - ◆ Tentative dates for the application period and enrollment deadlines and procedures, including an explanation of how the school intends to receive and process application forms and run a lottery, if necessary (considering the authorizer’s open enrollment and lottery schedule);
 - ◆ Nondiscriminatory admission policies, pursuant to T.C.A. §49-13-107;
 - ◆ Any proposed articulation agreements, pursuant to T.C.A. §49-13-113;
 - ◆ Identification of any pre-admission activities for students or parents; and
 - ◆ Policies and procedures for student waitlists, withdrawals, re-enrollment, and transfers.
- Describe how parents and other members of the community will be informed about the proposed school. How are you assessing the demand for your school?
- Describe your plan to recruit students in the year prior to opening with this authorizer, including the strategies, activities, events, responsible parties, and a timeline. What established community organizations are you targeting for marketing and recruitment? Consider pre-schools, civic groups, camps, summer programs, faith-based institutions, etc.
- Describe how students will be given an equal opportunity to attend the proposed school. Specifically describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students at risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.
- Describe student recruitment after the proposed school has opened. How will it differ from pre- opening recruitment? Note: for sponsors of existing schools, please identify how this will differ from current enrollment strategies.

1.11.A. Enrollment Policy

The Invictus Nashville Enrollment Policy is included as **Attachment D**. The Invictus Nashville enrollment policy prohibits discrimination based on race, color, religion, national origin, handicap/disability, sexual orientation, ancestry, need for special education services, or sex, including gender identity, gender expression, and appearance. The Invictus Nashville Board of Directors will ensure that admissions policies and procedures comply with federal, state, and local laws and policies.

1.11.B. Informing Families

Invictus Nashville prides itself on our community-codesign model. Our work over the past 18 months has been focused on engaging with, listening to, learning from, and gaining input from diverse stakeholders,

community members, and potential families of Invictus Nashville. In the following section of this application, **Section 1.12**, we present evidence of how this process has informed our design. We will continue this type of engagement as we shift towards recruitment and enrollment, because we believe that building an excellent school for all students means ensuring the families that we serve have a say in our processes. Our past, current, and planned engagement and information strategies are outlined below.

Information Sessions and Community Meetings

Since Fall of 2021, the Invictus Nashville Executive Director and Co-Design Team has held parent focus groups and information sessions online and in the community. Offering focus groups and information sessions online and in person was a strategic decision to meet the needs, preferences, and comfort of the greatest number of families. We have used our relationship with the YMCA of Middle Tennessee—Donelson Location to engage with many parents through tabling events. We have engaged in canvassing events to reach subgroup populations, and our online focus groups were helpful in providing feedback on our mission, vision, and design. We will continue to count on these partnerships in the community and strategic, targeted engagement to meaningfully engage with families in the Hermitage/Donelson/Old Hickory areas. Our effort to connect with community-based organizations and establish local partnerships in serving our targeted student population has been and will continue to be an effective means of reaching diverse families. When the school is operational, these partnerships will be essential during our expedition learning weeks and to provide additional wrap-around services for our families as needed. We have supplied community partners with print materials to share with potential families and will continue to spread this outreach in coming months.

In the Fall of 2022, we started a campaign to connect with all the preschools in our targeted community. We have connected with a few and plan to grow those numbers to share informational materials about Invictus Nashville. After establishing a partnership with preschools in the area, we plan to hold short informational meetings via video call or in person to share about our model. We will continue to supply schools with print materials to share with potential families and join any events to speak with those families. Targeted schools include preschools in or proximate to our proposed community, as well as charter middle schools that lack an elementary school and may have parents interested in an elementary charter option.

Online Presence

Beginning in May of 2022, Invictus Nashville has used multiple online platforms to promote and recap events, inform the community of our work, and offer online opportunities for families to engage with our work and offer input. Our website, www.invictus-nash.org, allows visitors to sign up for our monthly newsletter, submit a community input survey, sign a petition of support, and learn more about our school design and team. To date, our website has received over 1,000 unique visitors and our community input survey has received over 140 submissions. Our social media outreach has grown significantly. The Invictus Nashville Facebook has over 270 followers and Instagram has 100 and counting. These platforms were paramount in providing opportunities for families and community members to engage in our design process. To date, we have gathered over 200 signatures on our petition of support. Evidence of this engagement can be found with our letters of support in **Attachment E**. Our newsletter, launched in December of 2022, provides monthly updates, and communicates our design elements to the community, as well as sharing opportunities for the community to be more involved in our work.

Canvassing

In addition to hosting tabling events in the community, Invictus Nashville is planning to engage in multiple door-to-door canvassing campaigns during both the pre- and post-authorization phases of our work. These campaigns will allow us to meet and talk to members of our target communities in Districts

4, share information about our school, and begin to build relationships with potential families for enrollment. To date, while still over 18 months away from a projected school opening, the Invictus Nashville team has engaged in 15 canvassing and tabling events in Districts 4 during which we have spoken to over 100 families through 30 hours of canvassing and tabling. We are planning to engage in one canvassing event per month post authorization.

Adaptive Targeted Marketing

Targeted marketing will include social media ads, direct mailers, an email distribution list, stories, and ads on local media. All these efforts are in pursuit of reaching prospective families and community partners. Daily monitoring of application submissions beginning in the fall of 2023 and will allow us to adapt our marketing strategy based on the recruitment and enrollment goals of Invictus Nashville.

Diverse board

Our efforts to reach a diverse community of families will be supported by our board diversity. Our Governing Board members will represent diverse racial, cultural backgrounds, socio-economic status, and areas of expertise within the Nashville community.

1.11.C. Recruitment Plan and Timeline

We have a robust recruitment and enrollment plan that includes the leadership team maintaining a dashboard of current demographics of applications and enrollment number. This tracking system will inform the targeted outreach and engagement we pursue our goals for recruitment and enrollment. While this will inform our outreach, it will not in any way inform our lottery process. Our lottery process will remain completely open enrollment with no preference for any identity marker or subgroup. Our plan and timeline for this intentional work is shown in **Table 44**, which includes benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.

Table 44

Recruitment Plan and Timeline

TIMELINE	STRATEGY/ACTIVITY	RESPONSIBLE PARTIES	BENCHMARK/GOAL
August 2021— Ongoing	The continuation of relationship building with community partners and members and cultivating potential recruitment locations.	Executive Director Community Engagement Committee from the Invictus Nashville Board of Directors	Secure locations for weekly engagement events, information sessions, or recruitment events.
February— April 2023	Charter Application submitted and reviewed by local LEA. Evident parent and community support for the Invictus school model.	Executive Director Founding Invictus Nashville Board of Directors Community CoDesign Team BES Fellowship and Coaches	Application submission. 30 parent allies. 200+ petitions of support. 30+ letters of support. 15+ community partnerships.
July 2023	Charter Application potentially approved and school site confirmed for prospective families.	Executive Director Founding Invictus Nashville Board of Directors	Application approval. Confirmed location.
August 2023	Committee Action Planning meetings with BES Leadership Team.	Executive Director Community Engagement Committee from the Invictus Nashville Board of Directors	Collaborative, vetted, and approved Community Engagement and Recruitment Plan.
September— December 2023	Applications made available on Invictus website and in print. One Family Information Session per week hosted by community partners. Once per month canvassing event: door knocking to share information about enrolling, volunteering, and supporting. Collect information of all interested parties.	Executive Director Community Engagement Committee from the Invictus Nashville Board of Directors Volunteers Local Partners	115 Intent to Enroll Forms by 12/31 (represents 80% of total enrollment for year 1). —> The goal (at a minimum is to receive 30 intent to enroll forms per month starting in September. A compiled list of 30 volunteers.

Table 44, Recruitment Plan and Timeline (cont'd)

TIMELINE	STRATEGY/ACTIVITY	RESPONSIBLE PARTIES	BENCHMARK/GOAL
January 2024	<p>Daily monitoring of application submissions.</p> <p>Intentional outreach adjusts weekly based on applicant pool.</p> <p>Continue September—December outreach efforts.</p> <p>The Invictus Investment Campaign: Daily social media posts highlighting school details, family testimonials, and community support.</p> <p>Hold session specifically for all families that have submitted an intent to enroll form.</p>	<p>Executive Director</p> <p>Community Engagement Committee from the Invictus Nashville Board of Directors</p> <p>Volunteers</p> <p>Local Partners</p>	<p>Minimum 150 total intent to enroll.</p> <p>144 applications prepared or submitted for the lottery.</p> <p>75% of families attend our intent to enroll celebration and Q/A session.</p>
February 2024	Applications due to be postmarked or submitted electronically (date TBD by MNPS).	Families	180 total applications submitted.
March 2024— May 2024	<p>Lottery and notification to accepted families via call, email, and mail; intent to enroll decisions due.</p> <p>Ongoing recruitment efforts based on enrollment numbers. This includes but not limited to the following: targeted marketing, social media ads, school tours, community events, etc.</p> <p>Open seat offers made for families on the waitlist if needed.</p>	<p>Executive Director</p> <p>Founding Invictus Nashville Board of Directors</p> <p>Volunteers</p> <p>Local Partners</p>	<p>At least 80% of families accept their lottery notification.</p> <p>100% of Families that have accepted received school swag as welcome gifts.</p>

Table 44, Recruitment Plan and Timeline (cont'd)

TIMELINE	STRATEGY/ACTIVITY	RESPONSIBLE PARTIES	BENCHMARK/GOAL
June 2024	Ongoing recruitment efforts based on enrollment numbers Ongoing recruitment efforts based on enrollment numbers. This includes but not limited to the following: targeted marketing, social media ads, school tours, community events, etc. Host Family Welcome Event for enrolled families.	Executive Director Founding Invictus Nashville Board of Directors Volunteers Local Partners	Fully enrolled by June 1, 2024. 80% attendance from enrolled families at welcome event.
August 2024	School opens with kindergarten-first grade fully enrolled.	Invictus Nashville Founding Team	Fully enrolled with 144 students total in grades kindergarten and first grade. 30 student waitlist.

1.11.D. Ensuring Equal Opportunity

Invictus Nashville aims to provide all students with an equal opportunity to attend the school and to enroll a student body that is representative of the demographics of surrounding schools; this includes special populations such as low-income students, academically low-achieving students, students with disabilities, and English learners. We will closely monitor incoming applications and adjust marketing efforts in response to lower-than-expected application submission for student demographics. We will continue to demonstrate and make abundantly clear that Invictus Nashville is a school with a mission to **support all** students and that our unique design elements will equitably meet the needs of diverse learners. We will be intentional about removing barriers that might exist between our recruitment efforts and the application process. This can look like providing laptops, iPad, hotspots, and paper applications on site. We will have trained team members and volunteers that can assist in the application process to ensure families have access to our application process. We will also make it a valiant effort to have interpreters at all events to support this endeavor. Our informational sessions will ensure families who have students at risk of or with a history of academic failure that Invictus Nashville is a school that is equipped to support their children in a unique, tailored manner. We will also provide information on our team's experience in IEP management and 504 Plan management to give confidence to families with students with disabilities because we want everyone to know that despite their situation, it is our mission to ensure that all students find their unique path to personal and professional success.

To ensure that everyone has an equal opportunity to pursue our unique model, our marketing plan will include specifics based on our focus. Please see details below on how we plan to market our key components such as the Montessori curriculum, Project-Based Learning curriculum, mentoring, and community expeditions.

- Montessori and Project Based Learning Marketing
 - ◆ The following strategies help each other grow over time. They aren't meant to simply be completed in sequential order, rather they should all grow together over time. These strategies include content marketing, video storytelling, email newsletter building a database, and google remarketing.
 - **Content Marketing.** It is important to thoroughly understand and respond to the questions and concerns that parents are unfamiliar with when it comes to our model. We will ensure that our website and all posted content targets the questions that parents pose.
 - **Video Storytelling.** Invictus Nashville will work with a professional videographer to produce a video that showcases our school, teachers, and unique differentiators. For prospective parents, seeing is believing. Video can instantly bring your school's culture to life and establish its credibility.
 - **Email Newsletters.** Invictus Nashville understands the power of email marketing because we decide what content to send out, who should receive that content, and how it can be customized or segmented. We will provide customized newsletters to families about our Montessori and Project-Based Learning Programs. This will also include information about mentoring and our community expeditions.
 - **Building Databases.** Invictus Nashville will build a database so that we can proactively reach out to prospective parents.
 - **Google Remarketing.** We will employ google and social media marketing will allow our school to display ads on other websites to people who have previously visited your website.

1.11.E. Post Opening Enrollment

After our first recruitment cycle during our planning year, Invictus Nashville will align with the MNPS school choice calendar outlined by the School Options office. We will align our calendar for timeline and procedures to create a consistency in pursuing options for families. Once our school is open, the timeline and procedures for student recruitment will include hosting multiple information sessions during the fall semester at our school and at community organizations. In addition, we will hold weekly school tours open to sign up for anyone in the community leading up to the application deadline in February of the new year. School tours will be available year-round for any visitor hoping to learn more about our model or any family that has applied or been accepted that is hoping to begin becoming a part of the Invictus Nashville Community.

Invictus Nashville will recruit students throughout the school year through social media marketing, community outreach work, and community partnerships. While recruitment after opening will still be happening, it will be different in strategic ways. We will leverage relationships with current students and families for student recruitment because they will have authentic stories to share with potential families and students. Additionally, the capability of hosting school tours and information sessions at our school site will give prospective students and families an opportunity to experience our community. Student recruitment after opening will include:

Social Media Marketing

Social media is an essential ongoing recruitment tool. Dates and times for enrollment events including information sessions and school tours will be posted on social media in English, Spanish, and Arabic. We will share student, family, staff, and community testimonials as well. In addition, we will pay for targeted marketing ads when necessary. We will monitor our social media accounts and facilitate communication with interested families. This will include but not be limited to answering questions about the school model, enrollment procedure, and scheduling tours. In addition, ongoing posting about classroom projects and school community events will serve as a valuable recruitment tool for helping families get a feel for the learning community at Invictus Nashville.

Community Outreach Efforts

Our pre-opening efforts will be a continuation of our canvassing, posted flyers with partners, and direct mailers in our targeted community. We will closely monitor school application demographics each year and tailor outreach to maintain a balanced, diverse applicant pool that will support our mission and model.

Community Partnerships

We will continue to cultivate relationships with mission-aligned community organizations for recruitment. Our community service and expedition components will serve as highly visible, organic recruitment efforts. Invictus Nashville staff and students will be seen working alongside community organizations throughout the school year, and those community organizations will be able to share about the work authentically and passionately we are doing together for the community. We believe these partnerships will be an incredibly important part of our post-opening recruitment efforts.

Current Students and Families

Networking amongst interested families to spread the word about our work through information sessions we hosted will be essential before and after opening. After opening, the relationships we build with current students and families will be the most valuable recruitment tool that we will possess.

Current families will recruit their friends and family to attend information sessions and school tours as well as applying for future lotteries. Supporting our current students and families in culturally congruent ways and removing access barriers will be paramount in our success with future recruitment.

Responsive Marketing

The leadership team will conduct a demographic analysis during application season. This analysis will be owned by the Director of Operations, and the responsive plan will be a collaborative effort between the Director of Operations and the Executive Director. In Y2 and Y3, the Dean of School Culture and school principals will join this work. The Board of Directors Community Engagement Committee will also inform and support this work. Collaboratively, we will employ a responsive marketing strategy that will be informed by the current demographics of the applicant pool. For example, if there is a low number of students from a low socio-economic status, our marketing strategy will respond to that gap with an increase in outreach in neighborhoods that fall in that category and work with community organizations that also serve this population.

1.12. Parent and Community Engagement Support

In this section:

- What feedback regarding the startup of the proposed school has been provided by the community, and how has this feedback been incorporated into this application?
- Describe how you will engage parents and community members from the time that the proposed school is approved by this authorizer through the school's opening.
- Provide, as Attachment E, any of the following: letters of support, memoranda of understanding, or contracts that indicate the proposed school is welcomed by the community in which the school intends to locate, is viewed as an attractive educational alternative, and/or reflects the community's needs and interests.
- Outline how the proposed school will engage parents and community members in the life of the school (in addition to any proposed governance roles).
- Describe how parents will be informed and educated on all school policies and any commitments or volunteer opportunities the school will seek from, offer to, or require of, parents.
- If not already identified, describe any programs you will offer to parents and/or the community and how they may support the school mission and vision.

1.12.A. *Community Feedback and Implementation*

Community engagement and input has been a primary focus for the proposed Executive Director, Dr. Brenda Jones, since work began in designing Invictus Nashville. Dr. Jones joined the Build, Excel, Sustain Fellowship as a Community Co-Design Fellow. This intentional decision provided Dr. Jones the opportunity to have a full year to form a Community Co-Design Team and start gathering input from the community to inform the design of the school. The community co-design team consisted of volunteers. These volunteers included parents, educators, pastors, and students. The following are the names and professions of the co-design team: Amber Green—Director of ESA Program for the Tennessee Department of Education, Lisa Jimenez—Senior Manager of Student Information Systems for Rocketship Nashville, Cassandra Lemon—Entrepreneur, Miguel Reyna—College Student, Travis Stone—Spiritual Coach, Teresa Sander—Educator, Melinda Coston-Skyer—Educator, Sherrill Stafford—Community Organizer, Jordan Freeman—College Student. At the time of this application our team has met with over 257 stakeholders, including prospective families, educational leaders, community leaders, and community organizations. In addition to these themes, this community is highly interested in a Montessori curriculum for their students. Many parents mentioned being on a waitlist for Stanford Montessori and/or paying for private Montessori schools in the area because of the lack of public Montessori options. Our team spent time educating additional families about the Montessori Curriculum and our other areas of our model. These engagement opportunities have revealed support for our mixed methods approach to educating K–8 students. When we asked the question, “What do you wish you would see more of in a school environment?” responses have overwhelmingly followed themes of 1) students developing independent, life-long learning skills, 2) students having a mentor and support with their mental health, and 3) students having the opportunity to engage in community service. Each of these themes have been integrated into our design, as evidence throughout the academic plan of this application.

We have made two intentional shifts since the beginning of our work in direct response to overwhelming requests from the community. First, we shifted our grade levels in response to community demand. In early community engagement conversations and surveys, it became evident that the community was interested in a PreK–5 and equally interested in a high school. This question became an area of focus as we engaged further with families and it became obvious that our initial idea for a 6–12 might not be what the community wanted at the moment. In February 2022, we changed the language of our mission from “6–12 students” to “K–8 students” and began imagining what a great elementary/middle school combination would need if it were to support all learners in the Donelson/Hermitage/Old Hickory community.

Second, we shifted our focus from having students just participate in community service to analyzing the themes of why the community wanted community service. From community input, families associated community service with better decision making and exposure to their community and potential networking/career paths. This sparked research into the most progressive, effective ways of exposing students not only to service but to community partners. As our mission states, we want students to find their unique path to professional and personal freedom. This meant that they needed more exposure which led us to our expedition program. Students experience an expedition week that happens every quarter. Students can spend a week engrossed with community partners, different ways of learning, and completing community service. This will be a staple in our model at Invictus Nashville. This model meets the desires of the community, but it also adds an element to the MNPS landscape that is not currently present. We are excited to lead the way in supporting innovative endeavors outside of the classroom that will have an impact on the holistic development of the students in Nashville. This shift resulted in another change in our mission and vision in May of 2022.

1.12.B. Post-Authorization Community Engagement

Our plan for ongoing family and community engagement will remain a priority for Invictus Nashville post-authorization. We believe that community input is vital as we continue to implement our mission and vision during our planning year. The explanation in **Section 1.10** explains our plan post-authorization. We explain in detail our approach to designing, developing, and sustaining our school culture and discipline policies. We believe deeply in alignment between our mission and vision and being responsive to community desires and needs. **Section 1.11** of this application also provides a detailed timeline and strategy outline of our community engagement efforts post-authorization leading up to and beyond our first lottery. **Table 44** is a detailed example of how we will continue to engage the community post-authorization. Our governing board includes diverse community leaders aligned to our vision to design a school that is representative of our proposed community. In addition to serving on the Founding Board of Invictus Nashville, Board Members have been and will continue to be involved in our outreach and community engagement efforts. We will strategically target community partnerships that serve students in Grades K–8. This is also detailed in **Section 1.11**.

1.12.C. Letters of Support

Attachment E of this application includes letters of support from parents, community leaders, and community organizations that believe in our mission and vision. These letters display the support that is evident in the community for Invictus Nashville and the welcome that the school will experience due to its unique representation of the community’s needs and educational desires. These letters contain powerful personal stories and reflections on the vision for Invictus Nashville as a public charter school in MNPS that will ensure that our district is a welcoming community for all students and all families.

1.12.D. *Family and Community Engagement in the School*

Phoenix Meetings

Phoenix meetings are explained in detail in **Section 1.10** of this application. They will happen every quarter and we will invite our community partners and families to be involved in the planning process. These quarterly meetings will provide an opportunity to bring in families and student supporters to have step back meetings on student growth and achievement. In addition, they are focused on special topics, current events, and community building. These quarterly meetings will give our school an opportunity to address any cultural gaps at Invictus Nashville. These quarterly meetings will be a staple in our school identity.

Family and Community Surveys

Our embedded data meetings are critical moments of stepping back and assessing our progress and effectiveness of our design and mission. As mentioned previously, community impact is a core part of our mission, and we will gather input and data in order to monitor that impact. We will survey our families and community members biannually to gather their feedback on our school. We will ensure to remove all access barriers to maximize participation in these surveys. For example, all surveys will be made available digitally and on paper and provided in all necessary languages. We will identify trends from these surveys and create action plans. These trends and plans will be communicated to all families and community members using a variety of communication methods including but not limited to the following: school newsletter, all-calls, and quarterly Phoenix Meetings. The practice of providing our community with updates is to demonstrate that we are committed to continually refining our practices to make the school as strong as possible for all students and families.

Governance Roles

The Founding Board of Invictus Nashville includes members that represent a variety of community organizations and/or possess a set of skills that support the mission and vision of our school. After we have students enrolled, we will have parent representation on our Board. We want parent representation to ensure the interest of families is prioritized in board-level governance decisions. In addition, we will have a committee dedicated to Community Engagement to make sure this work is ongoing throughout operation.

Community Service and Expeditionary Learning Weeks

Community and Expedition Weeks will actively engage our community in the life of the school. We will establish relationships with community organizations for both service opportunities for service and exposure learning during expeditionary learning week. Our community partners will be able to have students come to their place of employment or come to our school site to discuss their roles and/or demonstrate the products from their craft. During this week, students will also be able to engage in leadership skill training and be exposed to different types of arts such as gymnastics, dance, theater, etc. These relationships and partnerships will be key in welcoming the community into the life of our school in authentic and dynamic ways. The trust built between our school and community organizations will create an intangible essence of trust throughout the community and communicate a common mission of creating a more equitable future with students that turn into adults that know their path to professional and personal freedom.

1.12.E. Communication with Families

We will pursue frequent communication with families about holistic growth and achievement through Back-to-School Nights, monthly mentoring calls, weekly behavior reports, tri-weekly academic reports, phoenix meetings, bi-annual surveys, and tri-weekly newsletters. These established modes of communication will be how we also share opportunities for parent engagement at Invictus Nashville and we will ensure to leverage our social media outlets as well. All this communication will be delivered in English, Arabic, and Spanish, as well as any other home languages based on our student enrollment.

Volunteering at Invictus Nashville is not mandatory for families. We will encourage and expect families to engage as important partners in their child's education. To support this effort, we will provide a variety of opportunities for parents to engage in supporting their child's academic journey. These might include the following:

- Teaching supporting lessons aligned to the Montessori and/or Project-Based Learning
- Providing tutoring services
- Supporting students in completing homework and extending learning activities in the home
- Facilitating or supporting Phoenix Meetings
- Facilitating or supporting Community Service or Expeditionary Learning opportunities
- Supporting teachers with materials preparation
- Supporting student recruitment efforts by recommending the school, preparing flier materials, and distributing, canvassing, or volunteering at recruitment events

Parents will have the opportunity to meet their child's mentoring at the beginning of the year. These meetings will allow families to preview scope and sequences, review the Student and Family Handbook with families, and strategize on ways to support their child throughout the year. Our monthly mentoring calls will serve as a continuous opportunity for families to talk about ways that each family can best support their student's learning and the overall learning program.

1.12.F. Programs Offered to Families and Communities

Invictus Nashville will offer opportunities for families and the community to be formally involved in our mission and vision outside of their support of their child's education. These opportunities are connected to establishing the Invictus Family Council (IFC). The Invictus Family Council is a way for families to become formally involved in the daily operations and programming of the school. This council will provide insight, feedback, and planning input on all Invictus priorities, policies, and events. The IFC will meet as often as their officers elect to, but they will be guaranteed two meetings each quarter with the leadership team present to build in collaboration and conversation between the IFC and the leadership team. Topics of discussion will include planning for Phoenix meetings, Community Service and Expeditionary Learning. The IFC will be involved in deciding themes for and planning Phoenix Meetings as well as supporting strong family attendance at these events. The organization of the IFC will benefit families and community members by providing consistent opportunities to engage with and learn new ways they can further support their child's education. Our Phoenix meetings, community service, and expedition learning weeks can be found in our annual calendar in **Attachment A**.

SECTION 2. OPERATIONS PLAN AND CAPACITY

2.1. Governance

In this section:

- Describe the composition and size of the governing board and board committees. Explain how the proposed governance structure and composition will ensure there will be active and effective representation of key stakeholders and will ensure the proposed school will be an educational and operational success.
- Describe how the board will evaluate the success of the proposed school, the school leader, and its own performance.
- How will the board develop over time? Explain plans for recruiting board members with identified skills and addressing board member attrition.
- Describe the training or orientation new board members will receive. What ongoing development will existing board members receive? Please note that Tenn. Code Ann. § 49-13-111 (o) requires annual board training, as certified by the Tennessee Charter School Center and approved by the State Board of Education; documentation of this training must be provided to the authorizer.
- Describe the circumstances under which complaints will be brought to the board, and the process for addressing them

Please include the following governance documents as Attachment F:

- ◆ F1. Articles of Incorporation
- ◆ F2. Proof of non-profit and tax-exempt status
- ◆ F3. By-laws
- ◆ F4. Code of Conduct
- ◆ F5. Conflict of Interest Policy
- ◆ F6. Board member resumes or biographies
- ◆ F7. Board policies (including frequency of meetings, open meetings and open records)

2.1.A. Composition and Governance Philosophy

Philosophy

Invictus Nashville will be governed by a Board of Directors (“Board”) that will ensure active and sustainable academic, fiscal, and regulatory oversight of the school. The Board will focus efforts on vision and policy setting while the daily decisions and implementation of the school vision and policies are in

the hands of school level management. The Invictus Nashville Board is and will be composed of community members with diverse sets of skills, backgrounds, and experiences. These individuals are and will be mission-aligned and fully committed to the oversight and accountability duties of the Board. The Board will understand its role, responsibility, and duty in oversight and accountability for all matters of school governance. In accordance with school management, governance at Invictus Nashville, the Board will have a clear focus on the holistic development of the students we serve. They will prioritize academic achievement, community engagement, fiscal health, growth and development, and regulatory compliance. The vision of Invictus Nashville will be at the forefront of all decision making, policy creation, and action planning. The Board will also ensure that the school is meeting all authorizer requirements.

Composition and Size

Invictus Nashville’s Board will always have a minimum of five to with a maximum of 15 members in accordance with its Bylaws. The Board currently consists of seven members. The Board has plans to grow to include 9 to members post-authorization before the start of the first school year. For voting purposes, the Board will consist of an odd number of Directors. The Board is intentionally designed to possess a variety of skill sets including legal, education, finance/accounting, human resources, marketing/PR, strategic planning, facilities, fundraising, and community engagement. The Board will hold regular monthly meetings and will meet more if ever deemed necessary during the life of the organization. The proposed Executive Director, Dr. Brenda Jones, will report to the Board and attend all Board meetings.

Table 45 provides all current Invictus Nashville Founding Board Members.

The Board will operate in committees, with all members of the Board serving on at least one committee. The committee structure, consisting of at least a Finance Committee, a Governance Committee, an Academics Committee, and a Community Engagement Committee. These committees will allow the board to apply areas of expertise to specific areas of oversight. Furthermore, a committee structure will ensure checks and balance so that no operation of the organization is only provided oversight by one individual. It will also promote collaboration and shared problem solving in oversight. For sustainability and longevity of the organization, the committee structure will allow for targeted recruitment of new board members when a committee need is identified.⁹¹

Our officer structure will also ensure our board functions at a high level of oversight. Each of these officers will be duly elected by the Board to serve in at least one-year terms. However, Directors will be elected to serve for a term of three years or until their successor has been elected and qualified, with the initial term commencing on the first July 1 after election. Should there be any unforeseen vacancies in Board officer positions, there will be special elections held at the immediately following Board meeting. A Director may not serve more than three consecutive terms from the commencement of the Director’s initial term.

Please see the officer and committees described below:⁹²

- ◆ The Board Chair will be the principal officer of the Board and serve as the liaison between the Board and the Executive Director. He or she will, when present, preside at all meetings of the Board of Directors. The Chair appoints the members of each standing or ad hoc committee of the Board and may serve on any standing or ad hoc committee of the Board.
- ◆ The Vice Chair will assume all duties of the Board Chair if the Board Chair cannot perform their duties or should the Board Chair need to rotate off the Board earlier than planned for unforeseen circumstances.

91 Hertilien, E. (2021, September 29). *Build. excel. sustain.* BES. Retrieved January 18, 2023, from <https://bes.org/>

92 Dickson, T. (n.d.). *Board Roles and Responsibilities.* Valorcollegiate.org. Retrieved January 18, 2023, from <https://valorcollegiate.org/>

- ◆ The Secretary will keep the minutes of the proceedings of the Board of Directors, see that all notices are properly given in accordance with applicable law and maintain appropriate financial information pertaining to the Board.
- ◆ The Treasurer will be responsible for all funds and securities of the school, receive and give receipts for monies due and payable, disburse the funds of the school in accordance with the directives of the Board of Directors, and provide an accounting of financial information to the Board.
- ◆ The Executive Director will serve at the pleasure of the Board as ex-officio, non-voting Member, report directly to the Board, be responsible for the day-to-day operations of the school and will provide regular reports to the Board regarding the performance of the School.

Committees

The Board will conduct its business through an efficient committee structure. The Invictus Nashville By-Laws provide the Board with the authority to establish ad hoc and standing committees. Committees will generally consist of three members and Board members will typically participate in only one or two committees to ensure active participation. While specific committee designations are not included in the By-laws, the Board anticipates creating four initial standing committees for it to properly exercise its academic, governance, community, and fiduciary roles. All these committees will meet at least once per month as determined by their committee.⁹²

- ◆ **The Governance Committee** of the Invictus Nashville Board will likely be chaired by the Chair of the full Board. The Governance Committee's primary responsibility will be to provide oversight, monitoring and evaluation of the Executive Director and to serve as a liaison to the full Board.
- ◆ **The Finance Committee** will coordinate the Board's financial oversight responsibilities by recommending policy to the Board and monitoring its implementation. The committee will also provide Board oversight of the organization's financial audit. The Treasurer of the Board will serve as chair, and the Committee will monitor the organization's financial records; review and oversee the creation of accurate, timely, and meaningful financial statements to be presented to the Board; review the annual budget and recommend it to the full Board for approval; monitor budget implementation and financial procedures; monitor assets, ensure compliance with federal, state, and other financial reporting requirements; and help the full Board understand the organization's financial standing.
- ◆ **The Academic Committee** will ensure that all trustees understand the academic promises in the charter and accountability plan and how well the organization is performing against those promises. This committee will educate the full board to conduct proper oversight of the academic program.
- ◆ **The Community Engagement Committee** will ensure that all trustees understand the community engagement and outreach promises in the charter and accountability plan and how well the organization is performing against those promises. This committee will educate the full board to conduct proper oversight of the community outreach program.

Representation of Key Stakeholders

All Invictus Nashville Board meetings will be open to the public in compliance with Pursuant to T.C.A. §8-44-101. Invictus Nashville will adhere strictly to Tennessee's Open Meeting Act. The Board will allocate time at each meeting for public comment, feedback, and questions. The days, times, and agendas of all meetings will be available on our website at least 72 hours before the meeting. In accordance with T.C.A.

§49- 13-109, our Governing Board will include at least one parent representative whose child is currently enrolled in Invictus Nashville. Our parent representative will be added to our Governing Board within six months of our school’s opening date.

Table 45**Invictus Nashville Founding Board Members**

FULL NAME	CURRENT JOB AND EMPLOYER	AREA OF FOCUS/EXPERTISE
Dr. Brenda Jones	Build Excel Sustain, Fellow	Proposed Executive Director
Dr. Allison McGuire	Entrepreneur	Proposed Board Chair
Neysa Taylor	Amazon, Senior Communications Manager	Proposed Vice Chair
Charles Webb	Florida Cancer Specialist, Corporate Development Team	Proposed Treasurer
Dawana Wade	Salama Urban Ministries, CEO	Proposed Secretary
John Little	Nashville Propel, Director of Community Outreach	Proposed Community Engagement Committee Lead
Penelope Pak-McMillen	Instruction Partners, Senior Director	Proposed Academic Committee Lead
Courtney Teasley	C. Teasley Law Firm, Attorney	Proposed Governance Committee Lead
Dominique Donette	Equity Strategist	Board Member

2.1.B. Board Evaluation of Self, School, and School Leader**Board Evaluation of Self**

The Invictus Nashville Board of Directors shall be the governing body charged with the responsibility for the operation of the public charter school. These responsibilities include but are not limited to the following:

- ◆ Review and maintain bylaws
- ◆ Support a clear mission, vision, and performance objectives
 - Establish, interpret, and enforce policies consistent with the mission
 - Act as charter school advocates and liaisons between the community and school
- ◆ Ensure fiscal health of the school including capital assets, operating budgets, fundraising, and endowments
 - Adopt the annual financial budget

- Approve monthly General Fund and other reports and approve expenditures as required by Board policy
- ◆ Hire, support, manage, and assess the Executive Director
 - Require reports of the Executive Director concerning the school's progress
- ◆ Evaluate itself annually and develop itself through orientation, ongoing education, and leadership succession planning
 - Ensure all members are actively involved in the work of the board and committees
- ◆ Establish strategic plans
 - Meet the terms of the charter and attaining established goals and objectives set forth in the charter document
- ◆ Assist in development of plans and specifications and provide financing for school facilities
 - Assure compliance with federal and state laws, regulations, and rules
 - Meet the legislative intent of raising student achievement and ensuring the school operates in a fiscally responsible manner evidenced by an unqualified audit annually
- ◆ Act as a final appeals board for personnel, parent, and student grievances
 - Hear communications, either written or oral, from stakeholders related to matters of policy

The Board will engage in reflective practice and self-evaluation of its own performance. The success of Invictus Nashville will depend on the Board's effectiveness in carrying out essential roles and responsibilities. Therefore, board self-evaluation is vital in determining how well the board is performing, and the steps that can be taken for continued improvement. Board self-evaluation will:

- ◆ Include the support of the board leadership.
- ◆ Be based on standards and best practices that characterize effective board performance.
- ◆ Be formal, conducted on a regular, agreed-upon basis, including a written assessment tool; and
- ◆ Include an assessment implementation plan to set goals for board improvement.⁹²

Given the accountability measures contained within the application, the Board evaluates itself against specific performance measures annually. The Board may use an existing platform and assessment tool such as that developed by Board on Track. Board on Track provides expertise, training and web-based tools to support charter school boards in improving their governance effectiveness through annual data tracking and performance analysis.

School Evaluation

In the Board's oversight role of the organization, they will monitor the schools' academic results, financial management, and organizational stability. Although school management is left with the responsibility of day-to-day operations, the Board is tasked with providing oversight and evaluation over how well the school is delivering on the mission, vision, academic and social-emotional goals outlined in the charter. The Board will have access to key metrics and data points through automated dashboards that are updated through the school's Student Information Systems and other data sources as deemed necessary by school leadership and The Board of Directors. The Executive Director will provide a formal report at least 72 hours before each monthly meeting of the Board to ensure the Board is prepared to discuss the same data points during the meeting. However, the Board will have the capability to access this information at any time. Access to these data points will position the Board to evaluate the effectiveness and fidelity of school management's execution of the school design and prioritized school goals. In addition, the Board will be provided with monthly financial statements that are prepared by

management along with the support of our financial back-office provider, which would have been approved by the Finance Committee. All finance statements will include a balance sheet, cash flow statement, income and expense statements, and the budget versus actual report. The Board is tasked with ensuring an annual fiscal audit of the school, in addition to annual reporting of all academic metrics, financial health, and overall school performance and health.

Our committee structure and access to current data and information will give the board both the structure and information it needs to hold the school management accountable for the goals set out in the charter. The committees will have a manageable number of goals and data sets to work with each month to ensure that their evaluation of the school is focused, comprehensive, and relevant each month and during the annual review.

Leader Evaluation

The Board will hire, determine compensation for, support, and evaluate the Executive Director. The Board will conduct a comprehensive, formal evaluation of the Executive Director to assess his/her effectiveness in executing the mission and vision of and delivering on the goals for Invictus Nashville⁹² as detailed in **Section 1.4**. This evaluation will be conducted by a committee of Board members led by the Board Chair. Members of the Evaluation Team (roles and processes described below) will also be trained in Tennessee's TEAM evaluation. The Board will provide the Executive Director with the support, resources and coaching necessary to lead Invictus Nashville to success. The Executive Director's primary goals are to ensure the high-quality academic program, strategic growth, and operational sustainability of Invictus Nashville. The Board will operate with the belief that evaluation is not a one-time event; rather, it is an ongoing and reflective process. The Board will deliver feedback to the Executive Director throughout the year as part of the evaluation process described below.

Process

The Governance Committee will lead the evaluation of the Executive Director, with responsibilities including⁹²

- ◆ Overseeing the process and ensuring the proposed timeline is followed.
- ◆ Collecting data from all stakeholders and summarizing it for the Committee, full Board and Executive Director, and
- ◆ Meeting with the Executive Director to review data and build a development plan based on that data.

The Evaluation Team (Governance Committee) will oversee the following areas:

- ◆ The Executive Director's Vision and Goals for the school year.
- ◆ Formative feedback process; and
- ◆ Final Evaluation.

Executive Director's Goals:

- ◆ The Executive Director and the Evaluation Team will develop a high-level set of goals (3-7 goals) that the ED will present to the Evaluation Team prior to each school year for approval.
 - Clearly defined academic achievement goals will always be part of the high-level set of goals.
- ◆ The Evaluation Team will oversee a year-end survey of identified stakeholders focused on the Executive Director's goals for the year.

Formative feedback:

- ◆ The Executive Director and Evaluation Team develop a set of specific areas to collect feedback on which may include but is not limited to:
 - Meeting or Exceeding Academic Performance Goals.
 - Level 3 or Above on the TEAM Administrator Evaluation; and
 - School Culture Surveys (Parent and Student Feedback).
- ◆ The lead on the Governance Committee will collect the formative data and will regularly share it with the Executive Director on a specified timeline as well as develop support plans to assist in areas of growth as needed.

Final review:

- ◆ The Evaluation Team will collect data at year-end related to the Executive Director's Goals and Formative Feedback and share it with the Executive Director.
- ◆ The Evaluation Team will develop and propose a support plan for the Executive Director that reflects the needs identified in the data; and
- ◆ The Evaluation Team will make a recommendation to the Board concerning the Executive Director's employment status and performance bonus.

2.1.C. Board Development

The identification, acquisition, and cultivation of new Board members with the necessary skills and mission alignment and commitment to oversight and accountability will occur through with the support of the full board and Executive Director. All board members will be trained on the appropriate recruitment strategies for prospects to ensure continuity and mission alignment. We will seek mission-aligned, high-capacity professionals who possess skill sets that our current Board lacks or to fill a gap in a connection and commitment to our community. The Board will grow to at least 9 individuals by school opening.

The majority of the Invictus Board has prior experience in the education sector and/or have served on nonprofit boards. The current members have expertise in community engagement and outreach, served as Executive Director of nonprofits, served as former Principals, served as Communications and Marketing manager, and worked as professors in Higher Education. Therefore, they are bringing this level of expertise to the role of serving on a charter school board. Board members will participate in a training on board responsibilities and performance management and will have a thorough understanding of their governing role. Members of the board will be trained to understand the importance and relevance of the charter agreement, performance contract, and ultimate responsibility for the school. To address gaps and/or attrition, all Board members will utilize their personal professional networks to support the growth of Board capacity and membership. This means that everyone can propose new members, but the Governance Committee will manage the vetting process before presenting them for formal consideration. All Board members will receive a handbook containing the Board's by Laws, Tennessee charter law, the articles of incorporation, and 501(c)(3) documentation, as well as member biographies. This handbook ensures members understand their duties and responsibilities as they sit on the board of a public school. All Board members will attend an orientation upon joining the Board. Per T.C.A. § 49-13-111(o), the Board will receive an annual training that has been certified by the Tennessee Charter School Center. We will provide documentation of the training to the Metro Nashville Public Schools Office of Charter Schools.

The Governance Committee will have the primary responsibility of prospecting and recruiting new board members. They will also present those prospect profiles to the Board and facilitate consideration and voting. The Board Chair and the Governance Committee will deliver training for new Board members around the mission and vision of the school. They ensure that new members are grounded in community need, the

distinction of responsibilities, the core design elements of the school design, as well as the committee structures of the Board. All new members will review the charter document, the Board's Bylaws, Conflicts of Interest Policy, and Code of Ethics. Onboarding new members will also include the review of previous meeting minutes to promote a smooth transition into an active role as quickly as possible.

2.1.D. Board Training and Orientation

Invictus Nashville will ensure the development, growth, and orientation of the Governing Board through robust team building, collaboration, and norming on policies and procedures. The Lead Founder, under the guidance and support of the leadership team at BES, will lead the Board in multiple development opportunities outlined below, which also includes the development the board will receive throughout the Spring of 2023:⁹¹

Table 46

Invictus Nashville Board Development

DATE	SUBJECT MATTER	CONTENT DELIVERED
Dec 1, 2022 — Feb 1, 2023	<ul style="list-style-type: none"> ▪ Mission ▪ Vision ▪ Key Design Elements ▪ Community Need 	Coaching calls between the Executive Director and each board member as part of the onboarding process. (20 hours)
February 1— March 1, 2023	<ul style="list-style-type: none"> ▪ Capacity Interview Preparation 	Individual and whole team meetings to prepare for the capacity interview, build camaraderie, solidify committee structure, and learn the details of the charter. (10 hours)
March 1, 2023— May 1—2023	<ul style="list-style-type: none"> ▪ Community Engagement and Advocacy 	Individual and whole team meetings to strategize community engagement and advocacy during the review period of the charter, further development of the committee structure and routinizing reporting structures. (10 hours)
May 1, 2023 — June 1 2023	<ul style="list-style-type: none"> ▪ Planning Year Build Out 	Depending on authorization decisions, strategic planning for our planning year and defining roles. (6 hours)
June 2023	<ul style="list-style-type: none"> ▪ Board Retreat 	Board retreat covering mission, vision, key design elements, community need, governance, anti-racism mindsets and structures, governance structure, oversight versus management, timeline, and community outreach plan, committee, and official selections. (2 days)
Post Authorization and Beyond	<ul style="list-style-type: none"> ▪ BES Organizational and Committee Action Planning Training ▪ Quarterly trainings on our key design elements ▪ Quarterly Community Engagement and Outreach ▪ Bi-annual—DEI Training 	<p>Training on organizational priorities and committees and action planning. (5 hours)</p> <p>Key design element training will happen quarterly aligned with our properties and any changes to our model. (12 hours)</p> <p>Quarterly Training and/or additional time as needed on our partnership and outreach efforts. (4 hours)</p> <p>The team will receive DEI training twice a year. (8 hours)</p>

2.1.E. Complaint Process and Procedures

Invictus Nashville is committed to keeping the lines of communication between all of our stakeholders, families, teachers, staff, students, and community members. Should one of our stakeholders have a concern, we will encourage them to contact the appropriate staff member. Invictus Nashville categorizes complaints as formal or informal. Both types of complaints have their own process to address the complaint in a timely and efficient manner. Invictus Nashville has adopted the complaint process from KIPP Southeast Nashville College Prep with minimum modifications. ⁸¹ Please see the process below:

- Informal complaints are complaints that do not violate the charter or the law. An example of an informal complaint would be academic grades or dress code policy.
 - ♦ An individual who (or group that) has an informal complaint against a school policy or member of the school community is encouraged to contact the appropriate staff member at the school by telephone. All staff members are committed to responding within 48 hours to informal complaints, either in person, by telephone, or in writing.
 - ♦ If an informal complaint is not responded to and resolved promptly or satisfactorily, the group or individual should contact the Executive Director to discuss the matter; the Director shall respond in person, by telephone, or in writing.
- A formal complaint is a complaint that concerns an alleged violation of law and/or charter. An individual who has a formal complaint against a school policy or a member of the school community may follow the steps below. As a matter of policy and practice, the Executive Director, MNPS School Board, and State Board of Education will not intervene in concerns which do not allege a specific violation of law and/or charter. The steps below outline the formal complaint process:
 - ♦ **Step 1.** Contact staff member involved: If a parent has an issue or concern, the first step toward resolving the issue will be to contact the staff member involved by phone or email. The staff member and the parent will then set up a meeting to discuss the issue either on the phone or in-person and work to reach a resolution that satisfies both parties.
 - ♦ **Step 2.** Written complaint sent to the school Executive Director. If the issue is not resolved satisfactorily, the parent's next step is to submit a written complaint to the school Executive Director who manages the staff member involved. The parent may pick up a complaint form at the school's front desk and may also fax, email, mail, or hand deliver (to the school's front desk) the complaint. The Executive Director will send a written decision to the parent within five business days of the school receiving the complaint letter. If more time is needed to conduct a thorough investigation, the parents will be notified of the new timeline.
 - ♦ **Step 3.** Written complaint to the Invictus Nashville Board: If the parent is unsatisfied with the Executive Director OR if the complaint is against the Executive Director decision, the parent may write a letter to the school's Board of Directors. The parent can fax, email, mail, or hand-deliver the letter. The Board or its designee will reply within three business days on behalf of the Board of Directors and may take up to 10 business days to investigate and reach a decision. The Board or its designee will send a written decision to the parent within 10 business days of receiving the letter or form. (Please note that the Board will not respond to complaints that have not gone through steps 1–2.)

Please see all governance documents as **Attachment F**. These documents include the following:

- F1. Articles of Incorporation
- F2. Proof of non-profit and tax-exempt status
- F3. By-laws
- F4. Code of Conduct

- F5. Conflict of Interest Policy
- F6. Board member resumes or biographies
- F7. Board policies (including frequency of meetings, open meetings, and open records).

2.2. Start-Up Plan

In this section:

- Provide a detailed timeline for starting the proposed school, specifying tasks and responsible individuals (including compensation for those individuals). This timeline should align with the Start-Up (Year 0) Budget in the Budget Workbook. If you are the sponsor of an existing school in the ASD, in lieu of the foregoing, attach a copy of your School Exit Plan.
- Describe what you anticipate will be the challenges of starting a new school or transitioning to your home LEA, as applicable, and how you expect to address these challenges.)

Invictus Nashville is committed to delivering on our promise to the community that we plan to serve. This will take efficient planning. **Table 47** includes our timeline, tasks, and responsible parties for the major startup action items that must be addressed prior to the opening of the Invictus Nashville. In our pursuit to have the strongest possible start, we have adopted our start-up plan based on the successful launch of Aventura Community School which launched in the Fall of 2022. The Invictus Nashville startup plan will be reviewed by the Invictus Nashville Board and the Executive Director to ensure timely progress on all action items. The start-up plan will be revised, as needed, to ensure the success of the goals. The timeline of the action items are based on our current beliefs and expectations which is why it will be to be reviewed and adjusted. Upon authorization and receipt of a charter, Invictus Nashville will create a more specific and comprehensive start-up plan to ensure we are prepared for a successful launch for the 2024–2025 school year.

Table 47

Invictus Nashville Start-Up Plan

TIMELINE	START-UP TASK	RESPONSIBLE PARTIES
Phase 1: 12–18 Months Prior to Launch January–June 2023	Secure initial financing:	Executive Director
	<ul style="list-style-type: none"> ▪ Submit charter startup grants. ▪ Identify other grant sources. 	Invictus Nashville Board of Directors
	<ul style="list-style-type: none"> ▪ Organize fundraising events and solicit funds from individual donors. 	
	Recruit and identify school leadership:	Executive Director
	<ul style="list-style-type: none"> ▪ Assistant Director to begin January 2024. ▪ Director of Operations to begin in January 2024. 	
	Community Outreach:	Executive Director
	<ul style="list-style-type: none"> ▪ Invictus Nashville leadership presents school vision to community organizations and parent groups. ▪ Launch website and social media. ▪ Recruitment materials posted in key community gathering spaces. 	Invictus Community Co-Design Team Invictus Nashville Board of Directors
	Secure Facilities:	Executive Director
	<ul style="list-style-type: none"> ▪ Identify potential sites through a lease or purchase model. ▪ Secure all permits and approvals for occupancy. 	Invictus Nashville Board of Directors

Table 47, Invictus Nashville Start-Up Plan (cont'd)

TIMELINE	START-UP TASK	RESPONSIBLE PARTIES
Phase 3: 2–6 Months Prior to Launch January–April 2024	Facilities and Operations: <ul style="list-style-type: none"> ▪ Leasehold improvements at incubation property begin in January 2024. ▪ Manage materials procurement including: curriculum and instructional materials; furniture; technology; cleaning supplies. ▪ Order and install signage. ▪ Develop/finalize school safety plans and schedule emergency drills. ▪ Ready student databases for records, grades, attendance, discipline, etc. 	Executive Director Director of Operations
	Staff Recruitment and Development: <ul style="list-style-type: none"> ▪ Ongoing recruitment, interviews, and hiring until all instructional and support positions filled(start dates for most staff in Phase 4, July 2024). ▪ Hire custodial staff. ▪ Finalize Summer Professional Development program and Professional Learning program for the 2024-2025 school year. 	Executive Director Assistant Director Director of Operations
	Student Recruitment: <ul style="list-style-type: none"> ▪ Final student outreach applications submitted. ▪ Lottery and enrollment in February 2024. ▪ Family Orientation April of 2024. 	Executive Director Assistant Director Director of Operations

Table 47, Invictus Nashville Start-Up Plan (cont'd)

TIMELINE	START-UP TASK	RESPONSIBLE PARTIES
Phase 3: 0–2 Months Prior to Launch May–July 2024	Facilities and Operations:	Executive Director
	<ul style="list-style-type: none"> ▪ Furniture, technology, and other materials delivered and school facilities set-up. 	Assistant Director
	<ul style="list-style-type: none"> ▪ Inventory all technology and ensure network and technology functionality. 	Director of Operations
	<ul style="list-style-type: none"> ▪ Final procurement of office supplies. 	
	<ul style="list-style-type: none"> ▪ Final health and safety inspections. ▪ Develop arrival and dismissal plan through collaboration with police and nearby schools. 	
	Staff Training:	Executive Director
	<ul style="list-style-type: none"> ▪ Staff orientation and founding professional development series in July 2024. 	Assistant Director
		Director of Operations
	Board Training	Executive Director
	<ul style="list-style-type: none"> ▪ Board Retreat in June of 2024. 	
	Student and Family Recruitment/Orientation:	Invictus Nashville
	<ul style="list-style-type: none"> ▪ Solicit additional applications/pull from waitlist as needed to fill all seats Student and family orientations prior to first day of school. 	School Based Leadership Team
	<ul style="list-style-type: none"> ▪ Pre-opening family/community events. 	Invictus Nashville Board of Directors

The in-depth details for key start-up tasks that include recruitment, facilities, and human capital are discussed in the appropriate sections of this application. The tables below have been reproduced from those sections to provide an overview of the associated timelines during the startup phase.

- **Table 48:** Recruitment and Enrollment
-

- **Table 49:** Facilities
- **Table 50:** Human Capital

Table 48**Recruitment Plan and Timeline**

TIMELINE	STRATEGY/ACTIVITY	RESPONSIBLE PARTIES	BENCHMARK/GOAL
August 2021— Ongoing	The continuation of relationship building with community partners and members and cultivating potential recruitment locations.	Executive Director Community Engagement Committee from the Invictus Nashville Board of Directors	Secure locations for weekly engagement events, information sessions, or recruitment events.
February— April 2023	Charter Application submitted and reviewed by local LEA. Evident parent and community support for the Invictus school model.	Executive Director Founding Invictus Nashville Board of Directors Community CoDesign Team BES Fellowship and Coaches	Application submission 30 parent allies 200+ petitions of support 30+ letters of support 15+ community partnerships
July 2023	Charter Application potentially approved and school site confirmed for prospective families.	Executive Director Founding Invictus Nashville Board of Directors	Application approval Confirmed location
August 2023	Committee Action Planning meetings with BES Leadership Team.	Executive Director Community Engagement Committee from the Invictus Nashville Board of Directors	Collaborative, vetted, and approved Community Engagement and Recruitment Plan

Table 48, Recruitment Plan and Timeline (cont'd)

TIMELINE	STRATEGY/ACTIVITY	RESPONSIBLE PARTIES	BENCHMARK/GOAL
September— December 2023	<p>Applications made available on Invictus website and in print</p> <p>One Family Information Session per week hosted by community partners</p> <p>Once per month canvassing event: door knocking to share information about enrolling, volunteering, and supporting. Collect information of all interested parties</p>	<p>Executive Director</p> <p>Community Engagement Committee from the Invictus Nashville Board of Directors</p> <p>Volunteers</p> <p>Local Partners</p>	<p>115 Intent to Enroll Forms by 12/31 (represents 80% of total enrollment for year 1)</p> <p>—> The goal (at a minimum is to receive 30 intent to enroll forms per month starting in September.</p> <p>A compiled list of 30 volunteers</p>
January 2024	<p>Daily monitoring of application submissions</p> <p>Intentional outreach adjusts weekly based on applicant pool</p> <p>Continue September—December outreach efforts</p> <p>The Invictus Investment Campaign: Daily social media posts highlighting school details, family testimonials, and community support</p> <p>Hold session specifically for all families that have submitted an intent to enroll form</p>	<p>Executive Director</p> <p>Community Engagement Committee from the Invictus Nashville Board of Directors</p> <p>Volunteers</p> <p>Local Partners</p>	<p>Minimum 150 total intent to enroll.</p> <p>144 applications prepared or submitted for the lottery.</p> <p>75% of families attend our intent to enroll celebration and Q/A session</p>
February 2024	<p>Applications due to be postmarked or submitted electronically (date TBD by MNPS)</p>	<p>Families</p>	<p>180 total applications submitted</p>

Table 48, Recruitment Plan and Timeline (cont'd)

TIMELINE	STRATEGY/ACTIVITY	RESPONSIBLE PARTIES	BENCHMARK/GOAL
March 2024— May 2024	<p>Lottery and notification to accepted families via call, email, and mail; intent to enroll decisions due</p> <p>Ongoing recruitment efforts based on enrollment numbers</p> <p>Open seat offers made for families on the waitlist if needed.</p>	<p>Executive Director</p> <p>Founding Invictus Nashville Board of Directors</p> <p>Volunteers</p> <p>Local Partners</p>	<p>At least 80% of families accept their lottery notification.</p> <p>100% of Families that have accepted received school swag as welcome gifts.</p>
June 2024	<p>Ongoing recruitment efforts based on enrollment numbers</p> <p>Host Family Welcome Event for Enrolled Families</p>	<p>Executive Director</p> <p>Founding Invictus Nashville Board of Directors</p> <p>Volunteers</p> <p>Local Partners</p>	<p>Fully enrolled by June 1, 2024</p> <p>80% attendance from enrolled families at welcome event</p>
August 2024	<p>School opens with kindergarten-first grade fully enrolled</p>	<p>Invictus Nashville Founding Team</p>	<p>Fully enrolled with 144 students total in grades kindergarten and first grade</p> <p>30 student waitlist</p>

Table 49**Facilities Timeline**

TIMELINE	FACILITIES GOALS AND ACTION ITEMS
12-18 Months Prior to Opening February 2023	<ul style="list-style-type: none"> ▪ Invictus Nashville Charter application submitted, reviewed, approved ▪ Tour at least five facilities in the target community ▪ Potential locations narrowed to finalists ▪ LOIs from top two facility choices
12 months Prior to Opening August 2023	<ul style="list-style-type: none"> ▪ Final decision on incubation location made and lease signed upon receiving charter authorization ▪ General Contractor RFP and selection ▪ Arrange for and carry out any necessary renovations ▪ Arrange purchase of furniture for classrooms, offices ▪ Bidding process for utility and vendors (phone, internet, waste removal, janitorial, etc.)
6 months prior to Opening February 2024	<ul style="list-style-type: none"> ▪ All construction completed ▪ Certificate of Occupancy approval ▪ Utility and vendors contracts signed
3 months Prior to Opening May 2024	<ul style="list-style-type: none"> ▪ All furniture and technology installation complete ▪ Final facilities walkthrough
2 months Prior to Opening June 2024	<ul style="list-style-type: none"> ▪ Parent Welcome event at the new facility
1 Month Prior to Opening May 2024	<ul style="list-style-type: none"> ▪ Staff Summer Institute in July of 2024
August 2024	<ul style="list-style-type: none"> ▪ Students report for the first day of school

Table 50

Hiring Timeline

TIMELINE	RECRUITMENT TARGETS
February–April 2023	<ul style="list-style-type: none"> ▪ Charter Application submitted and reviewed by MNPS
July 2023	<ul style="list-style-type: none"> ▪ Charter Application approved and recruitment efforts begin (ongoing until all positions filled)
August–December 2023	<ul style="list-style-type: none"> ▪ Interviews, hiring, and background check for Director of Operations and Assistant Director ▪ Multiple rounds of interviews for Lead K-1 classroom teachers
December 2023	<ul style="list-style-type: none"> ▪ Reference and Background Checks for Lead classroom teachers
January 2024	<ul style="list-style-type: none"> ▪ Director of Operations and Assistant Director start in their roles ▪ All lead classroom teachers hired
February–April 2024	<ul style="list-style-type: none"> ▪ Multiple rounds of interviews for assistant teachers, K–1 classroom teachers, all other staff positions ▪ Reference and background checks for apprentice classroom teachers all other staff positions
May 2024	<ul style="list-style-type: none"> ▪ All teachers and staff hired
July 2024	<ul style="list-style-type: none"> ▪ Staff summer training ▪ Operations staff finalizes preparations of building and systems
August 2024	<ul style="list-style-type: none"> ▪ School opens with kindergarten-first grade

2.2.A. Challenge of Start-Up

Student Enrollment

Most new charter schools struggle due to their finances. Research studies have shown that there is a 13-million-dollar gap between how charters are funded versus traditional public schools.⁹³ Therefore, we have been intentional with our budget. The majority of our annual budget will come from BEP funding. Therefore, enrollment will be a top priority that we consistently focus on at Invictus Nashville every year. To execute on enrollment, we have developed a comprehensive recruitment plan that leverages the support of community partners and what we have learned through our community engagement over the past 18 months. We are grateful for our relationships with the Donelson YMCA that has helped us engage with age-eligible families to spread the word about our unique school model. Over the past year, the Donelson YMCA has allowed us to set up tables during their Fall Soccer and Basketball games so that we can speak with families. We will continue to cultivate our current relationships and build new relationships in honor of our core values of collaboration and community. As a contingency, and as mentioned in **Attachment O**, our 72 student enrollment goal accounts for attrition, missed targets, etc. from a budget perspective.

Facilities

Due to our extended timeline, we have had the opportunity to work with a broker for the past 3 months to find a facility. This broker will continue to work behalf of Invictus Nashville to find our temporary site and eventual permanent site. We have identified and will continue to identify potential viable spaces within our target zone. As part of our search for a facility, we have started a search for a commercial real estate company in preparation for authorization. The proposed Executive Director, Dr. Brenda Jones is working with Greg Barrow from Southeast Ventures and Level Field Partners in this endeavor. As part of our facility acquisition plan, we will work with developers, project managers, and other contractors as needed to ensure that we meet all building requirements and receive all necessary permits and safety inspections prior to opening and upon any expansion projects. In addition to this work, Invictus will have support from The Tennessee Charter School Center. They provide advice and support for the facilities process for new charter schools in Tennessee

Talent Recruitment

We know that our unique, innovative model will present talent acquisition challenges. The elementary school will need to recruit highly qualified, and Montessori trained lead teachers. With this understanding, our talent efforts will target these types of teachers in our local, state, regional, and national recruitment plan. Our hope is to staff our school with as many local educators as possible, and we will consistently work to ensure that our staff is representative of our school community and larger community. To assist with our efforts and the desire to stay local, we have partnered with Arete Memphis Public Montessori Residency. This is a two-year residency that allows lead teachers to receive their Montessori certification. This prep program was developed by Bob Nardo, the Executive Director of Libertas School of Memphis. We will work with organizations such as the Tennessee Educators of Color Alliance, Belmont University, Middle Tennessee State University, and Trevecca Nazarene University, and

⁹³ Lewis, B. (2019). *Analysis: New analysis shows how a \$13 billion funding gap between charter schools & traditional public schools hurts underserved students*. The 74. Retrieved January 9, 2023, from <https://www.the74million.org/article/analysis- new-analysis-shows-how-a-13-billion-funding-gap-between-charter-schools-traditional-public-schools-hurts-underserved- student/>

other local recruitment opportunities to make this priority actionable. More details on our recruitment plan can be found in **Section 2.4**.

2.3. Facilities

In this section:

- Describe the proposed school’s facility needs based on the educational program and projected enrollment, including: number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Identify additional school spaces and their square footage, including: science labs, art room, computer labs, library/media center, cafeteria, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, workroom/copy room, supplies/storage, teacher work rooms, restrooms, and other spaces.
- Explain how the above-described facility needs tie to the related items in the proposed school’s budget.
- Describe the experience of the board and/or leadership team in facilities acquisition and management, including managing build-out and/or renovations, as applicable.
- Describe the process for identifying and securing a facility, including any brokers or real estate consultants you are employing to assist in finding a facility.
- Describe the plan for compliance with all Americans with Disabilities Act (ADA) requirements, all applicable city planning review procedures and all health and safety requirements per T.C.A. § 49-13-107. Include associated costs in budget details.
- Present a timeline with reasonable assumptions for facility selection, requisition, renovation, state fire marshal and health inspections, and occupation.
- Broadly describe a contingency plan, should your facility fall through.
- List any properties you may have already identified as suitable to meet the proposed school’s facility needs.

2.3.A. Facility Needs

Invictus Nashville is committed to finding and leasing a facility that can safely and adequately meet the academic and programmatic needs of all our students. Invictus Nashville will launch with three kindergarten classes and three first grade classes. We will add one grade per year until reaching eighth grade. Our enrollment capacity needs are shown in **Section 1.2**. Based on our projected enrollment capacity, Invictus Nashville has worked with experienced educational facility planners to develop a space requirements program that aligns with its program to ensure Invictus Nashville provides its students and staff a safe and effective learning environment. **Table 51** represents our minimum space requirements for running our academic program successfully, though we will aim to find a facility that allows us to go beyond that in elective offering, teacher workspaces, elective studios, computer labs, etc.

Table 51**Facility Needs by Year**

	24'– 25	25'– 26	26'– 27	27'– 28	28'– 29	29'– 30	30'– 31	31'– 32
Grades Served	K–1	K–2	K–3	K–4	K–5	K–6	K–7	K–8
Total Enrollment	144	216	288	360	432	552	672	792
General Education								
# of Classrooms	6	9	12	15	18	24	30	36
Total Classroom Space	5,973	10,672	13,724	18,664	22,443	30,262	36,733	45,475
Enrichment Spaces								
# of Classrooms	2	2	3	3	4	4	6	6
Total Classroom Space	1,991	2,372	3,431	3,733	4,987	5,263	7,871	8,268
Special Education Services								
# of Rooms	1	1	2	2	3	3	4	4
Total Classroom Space	415	494	953	1,037	1,559	1,645	2,186	2,297
Common Spaces								
# of Rooms	3	3	4	4	4	6	6	6
Total Classroom Space	2,996	3,557	4,575	4,977	4,987	6,168	6,149	6,459
Administrative Spaces								
# of Rooms	1	1	2	2	3	4	4	4
Total Classroom Space	155.5	185.3	357.4	388.8	584.4	822.3	819.9	861.3
Min. Sq. Ft. Needed	11,650	14,050	19,500	21,900	25,850	33,950	40,800	45,600

2.3.B. Alignment of Facility Needs and Budget

We have estimated our budget based on needing about 80 square feet per student to meet the needs of our instructional model. We use this same estimate above to arrive at our values in the “Minimum Square Feet Required” row at the bottom of **Table 51**. In addition to homeroom/core academic classrooms mentioned above, Invictus Nashville has planned for a gym, full-size cafeteria and kitchen, enrichment spaces (art, music, etc.), a main front office, multiple smaller offices and meeting spaces, two larger teacher work rooms with copiers, and a large storage room which are described as common spaces. Invictus Nashville will construct spaces with built-in storage and, where appropriate, soundproofing and plumbing. The design of the learning spaces will focus on maximizing student accessibility. The school will also prioritize outdoor spaces including playgrounds, play fields, and a school garden. With our elementary approach being Montessori, we reserve the most amount of space throughout our growth for instructional spaces to accommodate our instructional plans. The first two years we plan to have shared space for our administrative team. This shared space will allow our administrators to live our core values of collaboration and community.

Invictus Nashville assumes it will identify and secure temporary or incubation space for the first three years that will be leased at an estimated \$15 per sq. ft. The rent estimate is net of utilities (\$2 per sq. ft.) and custodial expenses. (\$1 per sq. ft.) Invictus Nashville will also budget \$200,000 in tenant improvements.

Invictus Nashville has researched several national Community Development Financial Institutions (CDFI) about financing a permanent site. Invictus Nashville hopes to secure additional financial support from the Charter School Growth Fund, New Schools Venture Fund, Build Excel Sustain, and/or philanthropic support during our startup and growth years. Estimates and assumptions for these funding sources are detailed in the attached school budget. Overall, Invictus Nashville assumes an average of approximately 15% of revenue on occupancy costs with operating expenses of approximately \$6/sq. ft.

2.3.C. Founding Team Experience

The Invictus Nashville Founding team will identify the most optimal and fiscally responsible facility to begin operations in our founding years. Our Facilities Task Force will include our proposed Executive Director, Dr. Brenda Jones, who has already done extensive work in finding potential facilities. Our Facilities Team includes a broker from Southeast Ventures, Greg Barrow and Level Field Partners. They will more formally lead the work of contracting with commercial realtors and architects as needed. We have had the opportunity to have initial conversations and connections with important partners in navigating the facilities and financing landscape in Nashville; specifically, The Donelson/Hermitage/Old Hickory areas. Our partners have aided us in navigating the commercial real estate options in our proposed community. Southeast Venture is a commercial real estate company that partners in revitalization, urban redevelopment, and other aspects of improving Nashville and communities across Middle Tennessee. They have a passion for the arts, green space, health, wellness, and learning. Our proposed Executive Director has continued learning about these lending opportunities and building relationships with lending organizations by attending workshops on startup funding from Level Field Partners and NewSchool Venture Fund. Our Lead Founder/proposed Executive Director has also engaged in learning conversations with Natalie Morosi, Executive Director of Aventura, and James Renfro Co-Founder of Tennessee Nature Academy, explicitly about their experience with facilities acquisition and buildout plans.

2.3.D. Facility Acquisition Process

Greg Barrow from Southeast Ventures has partnered with Invictus Nashville, and his firm has a demonstrated track record supporting nonprofit organizations, in identifying and securing mission-aligned facilities in the proposed community. Invictus Nashville has carefully considered facility options within its overall growth strategy. To bolster the support of our facility search, we have partnered with Level Field Partners as well.

Level Field provides best-in-class technical assistance for all stages of the charter school real estate development and financing processes. Through these partnerships, we have decided leasing a smaller incubation space as the best strategy for our launch and initial first three growth years. This will allow additional time to identify a permanent facility. Invictus Nashville has identified three potential incubator spaces. The leading property and contingency plan are described in the appropriate sections below. Invictus Nashville will pursue the proposed incubation space and engage an architect and contractor in the fall of 2023. This earlier timeline will provide sufficient time for improvements that can begin in January of 2024. Therefore, allowing ample time for completion ahead of opening with students in August 2024 (timeline detailed below).

The permanent Invictus Nashville facility will be secured via long-term lease or purchase. It will serve the school's mission and vision for our K–8 model. Invictus Nashville will have one to three years in a temporary location which will allow time to identify the location. In addition, it will allow the school to demonstrate a strong track record of performance and enrollment which will support acquisition of the permanent property. Invictus Nashville is certain that we can implement our phased plan and secure a permanent site after our initial three years. The plan will be expedited if we can secure additional funding.

2.3.E. Compliance with ADA Requirements

Invictus Nashville will keep compliance with all laws associated with school facility management. All facility partners will perform initial assessments on existing sites to provide information and advice to the Board about the existing structure and any improvements that would be necessary for ADA compliance. We will consult with a professional code assessor to ensure compliance based on the recommendations/After reviewing the code assessment, the Facilities Team (Invictus Leadership, The Finance Committee, Level Field Partners, and Greg Barrow) will ensure compliance with all Americans with Disabilities Act (ADA) requirements, planning review requirements, and safety requirements per T.C.A. § 49-13-107.

2.3.F. Facilities Occupation Timeline

Table 52 explains our timeline for facilities selection, acquisition, and initial timelines. This table includes contractor work, as we are aware that there is a high likelihood for the need of renovations and remodeling.

Table 52**Facilities Timeline**

TIMELINE	FACILITIES GOALS AND ACTION ITEMS
12-18 Months Prior to Opening February 2023	<ul style="list-style-type: none"> ▪ Invictus Nashville Charter application submitted, reviewed, approved ▪ Tour at least five facilities in the target community ▪ Potential locations narrowed to finalists ▪ LOIs from top two facility choices
12 months Prior to Opening August 2023	<ul style="list-style-type: none"> ▪ Final decision on incubation location made and lease signed upon receiving charter authorization ▪ General contractor RFP and selection ▪ Arrange for and carry out any necessary renovations ▪ Arrange purchase of furniture for classrooms, offices ▪ Bidding process for utility and vendors (phone, internet, waste removal, janitorial, etc.)
6 months Prior to Opening February 2024	<ul style="list-style-type: none"> ▪ All construction completed ▪ Certificate of Occupancy approval ▪ Utility and vendors contracts signed
3 months Prior to Opening May 2024	<ul style="list-style-type: none"> ▪ All furniture and technology installation complete ▪ Final facilities walkthrough
2 months Prior to Opening June 2024	<ul style="list-style-type: none"> ▪ Parent Welcome event at the new facility
1 Month Prior to Opening May 2024	<ul style="list-style-type: none"> ▪ Staff Summer Institute in July of 2024
August 2024	<ul style="list-style-type: none"> ▪ Students report for the first day of school

2.3.G. Facilities Contingency Plan

The facilities contingency plan is identifying additional smaller spaces that Invictus Nashville could use as an incubation site for one to three years to allow more time for identification and build-out of a mission-aligned long-term school facility. This practice has proven successful for charter schools in our district. Potential spaces could include current schools, box stores, or churches. The Invictus Nashville proposed Executive Director has connected with charter leaders in Nashville, as well as neighborhood charter friendly associations to explore all facilities options that may be available to the school. Invictus Nashville will budget for leasehold improvements as needed. The preferred incubation facility as well as other potential properties are described in the next section.

In 2017, “the Tennessee legislature established a public charter school facilities program, pursuant to which State funds are allocated annually to charter schools to assist them with acquiring and improving their facilities. The legislature approved a one-time allocation of \$24 million for FY22 and \$6 million in recurring funds for future years. \$6 million of the FY22 funds will be allocated to schools based on their student enrollment. The remaining funds will be awarded to schools through this competitive grant process. These funds will be made available on an equitable basis for the benefit of public charter schools of all sizes, characteristics, geographic locations, and authorizers.”⁹³ Invictus Nashville will pursue these grants pending approval to support our facilities development plan.

2.3.H. Potential Facilities

The Invictus Nashville team has explored many preliminary facilities options over the last several months. We have engaged many community partners and organizations in aiding our preliminary search for a suitable facility. We have updated our list of potential facilities to show changes that have occurred since February 1 when the original application was submitted. These are options for incubation spaces and permanent spaces that are willing to lease to us as a charter school and comply with Tennessee Code Ordinances for educational use. According to Section 8, the zoning codes that do not permit educational use by right will permit educational uses when classified as an “adaptive reuse” or those that are using existing structures. A valid use and occupancy permit must have been issued for the structure at any point within the last five years, which these sites have acquired. A feasibility study is being conducted by our LevelField partners and will conclude by June 15, 2023. We have more research and conversations to conduct before we formally move forward on any of our identified options:

- 1. 2501 McGavock Pike.** This space is in our targeted region. It would be an ideal space for incubation and a permanent location with 108,271 square feet available to lease. The ownership has completed deals with charter schools in the past and are willing to lease to Invictus Nashville. They also have permits that will allow for educational use. They are undergoing a feasibility study with our partners.
- 2. 30 Rachel Drive:** This space is in our targeted region. It would be an ideal space for incubation and would sustain us for 5 years. There is 32,112 square feet available to lease. The owner is willing to lease to Invictus Nashville. They also have permits that will allow for educational use. They are undergoing a feasibility study with our partners.
- 3. 108 Donelson Pike:** This space is in our targeted region, and it would be an ideal space for incubation. It is owned by HG Hill Realty Company which is investing in the site over the next few years for multi-purpose space. It has 60,000 square feet. \$20 per square foot is the rate for lease. There is a letter of support included in our application to demonstrate the conversations that are happening about spacing. It would reduce the need for extensive transportation for many of our targeted communities. It has also been used as a school before, which would make it more easily

⁹³ 2022-23 Charter School Facilities Fund High-Quality Expansion Competitive Grant Application. TDOE (2022).
https://www.tn.gov/content/dam/tn/education/legal/FY22_Charter_Facilities_Grant_Application_Expansion_FINAL.pdf

suitable for our use. Our Finance Committee, LevelField Partners, and broker with Southeast Ventures will continue to weigh the costs of pursuing this property and the feasibility of pursuing such a property at this stage in our growth.

- 4. 1809 Dabbs Avenue:** This space has 20,000 square feet. \$24 per square foot is the rate for a lease. This property will need very few renovations due to it being built for a nursing school. This school is in our targeted region, and it would be an ideal space for incubation.

Researching and identifying potential facilities opportunities continues to be a consistent and ongoing priority for our team.

2.4. Personnel/Human Capital

In this section:

- Describe the school’s proposed leadership structure. Include a copy of the school’s organizational chart at Year 1 and at full capacity as Attachment G. The organizational chart should clearly delineate the roles and reporting structure of the board, staff, any related bodies (such as advisory bodies or parent/educator councils), and any external organizations that will play a role in managing the school.
- Give a thorough description of the process and timeline for hiring the school leader, identifying the skills, qualifications, and characteristics the applicant will seek in a leader. If the leader has already been identified, attach the leader’s resume. Explain the responsibilities of the school leader, how the school leader will be supported and developed, and the state-approved administrator evaluation model that you will be using for this individual, as required by State Board Rule 0520-02-01 and State Board Policy 5.201.
- Describe your strategy, plans, and timeline for recruiting and hiring additional key staff, including, but not limited to, operational staff, administrators, and teachers. Identify key selection criteria and any special considerations relevant to your school design. Provide previous student achievement data for the individuals responsible for academic programming (if available) as Attachment H.
- How will your recruiting and hiring practices ensure that the composition of the leadership team and staff reflects the diversity of the student body and surrounding community?
- How will you ensure that teachers are licensed and endorsed in their content areas?
- Indicate the state-approved evaluation model used for teachers, required by State Board Rule 0520-02- 01 and Policy 5.201. Describe the policies and procedures for evaluating staff, providing feedback, and celebrating excellence.
- Describe how the proposed school intends to handle unsatisfactory leadership or teacher performance, including termination, as well as leadership/teacher changes.
- Outline the proposed salary ranges and employment benefits, as well as any incentive or reward structures that may be a part of the compensation system. Explain the school’s proposed strategy for retaining high-performing teachers.

2.4.A. Proposed Leadership Structure

Year 1—School Leadership

The first three years Invictus Nashville will have a three-person leadership structure. This will include the Executive Director, the founding Assistant Director and the Director of Operations. The goal is to have the Invictus Nashville leadership positions confirmed by the board by summer of 2023 post - authorization.

- ◆ The proposed Executive Director is the primary applicant of Invictus Nashville, Dr. Brenda Jones, and will be confirmed and hired by the board upon authorization of this charter. The Executive Director will be responsible for executing all necessary tasks to manage the school, including hiring and supervision of all teachers, leaders, and other staff. The Executive Director will act in this role until school year 5, at which point, an Elementary School Director will be hired. At this point, the Executive Director will transition to managing the day-to-day at the Middle School and serving as site management for the elementary school. At capacity, a Middle School Director will be named, and the Executive Director will transition school site-based management to the Directors of the Elementary and Middle Schools.
- ◆ The proposed founding Assistant Director once identified and upon authorization of this charter will be contracted on a stipend, part-time, or full-time basis during the planning year (2023-2024 school year). We have budgeted for this role to begin full time in January 2024 pending authorization and funding.
- ◆ The proposed Director of Operations once identified and upon authorization of the charter will be contracted on a stipend, part-time, or full-time basis during the planning year. We have budgeted for this role to begin full time in January 2024, pending authorization and funding.

The roles and responsibilities of the three-person school site leadership team will at the time launch are detailed in

Table 53.

Table 53

Invictus Founding Leadership Roles and Responsibilities

EXECUTIVE DIRECTOR	ASSISTANT DIRECTOR	DIRECTOR OF OPERATIONS
Shared Responsibilities		
<ul style="list-style-type: none"> ▪ Community engagement ▪ Staff recruitment and hiring ▪ Professional development ▪ Student recruitment and retention ▪ Coordination of Expedition Learning Weeks ▪ Testing Coordinators 		
<ul style="list-style-type: none"> ▪ Finance ▪ Fundraising ▪ Facilities Planning ▪ Board Management ▪ Compliance ▪ Growth and Expansion 	<p>School Culture</p> <ul style="list-style-type: none"> ▪ Discipline program ▪ Restorative practices <p>Curriculum Development</p> <ul style="list-style-type: none"> ▪ Instructional leadership and teacher coaching for Humanities and Related Arts <p>Support Team</p> <ul style="list-style-type: none"> ▪ Coordinator of Student Support Services (prior to Y3) ◆ Special Education ◆ EL Education ◆ Manage Specialists and Counselors 	<ul style="list-style-type: none"> ▪ Student Enrollment ▪ Student Data Management <p>Operations</p> <ul style="list-style-type: none"> ▪ Compliance ▪ Facilities—Daily Operations including transportation ▪ Operations—Managing Vendor Partnerships ▪ HR: Benefits and Payroll <p>Manager</p> <ul style="list-style-type: none"> ▪ Office Manager ▪ Director of Community Expeditions and Partnerships (Y3+) <p>Community Survey Coordinator</p>
<p>Manager</p> <ul style="list-style-type: none"> ▪ Assistant Director ▪ Director of Operations <p>Curriculum Development</p> <ul style="list-style-type: none"> ▪ Instructional leadership and teacher coaching for Math and Science <p>School Culture</p> <ul style="list-style-type: none"> ▪ Mentoring/SEL Program 		

In Year 3 of the operation, 2026–2027, Invictus Nashville will add additional leadership positions and will hire a Director of Student Support Services and Director of Community Expeditions and Partnerships:

- ◆ The Director of Student Support Services will manage counselors, Special Education, and EL Education and will lead the Invictus Nashville team in ensuring equitable outcomes for students with special needs. They will coordinate all student support services, oversee the Student Support Team (S-Team), and work to create a positive school climate.
- ◆ The Director of Community Expeditions and Partnerships will manage relationships with our community partners and oversee programming for community services and expedition learning

weeks, as well as community events and strategic growth and outreach, all of which are crucial to our school mission and vision.

In Year 5, Invictus Nashville will expand to add the middle school starting with Grade 6, There will be transitions for leadership. The Executive Director will transition to managing the day-to-day at the middle school and serving as site management for the elementary school. A new Assistant Director will be named to support the Elementary School Director and an Assistant Director will be named to support the Executive Director with the Middle School. In addition, Invictus Nashville will hire additional leadership positions, installing one Dean of the Lower School and one Dean of the Upper School. The Dean of Culture is primarily responsible for fostering a school climate that maximizes student learning. They oversee student discipline systems, responsive practices, and the school’s mentoring program. They work with the Director and Assistant Director to coordinate professional development in these areas

At Capacity—School Leadership

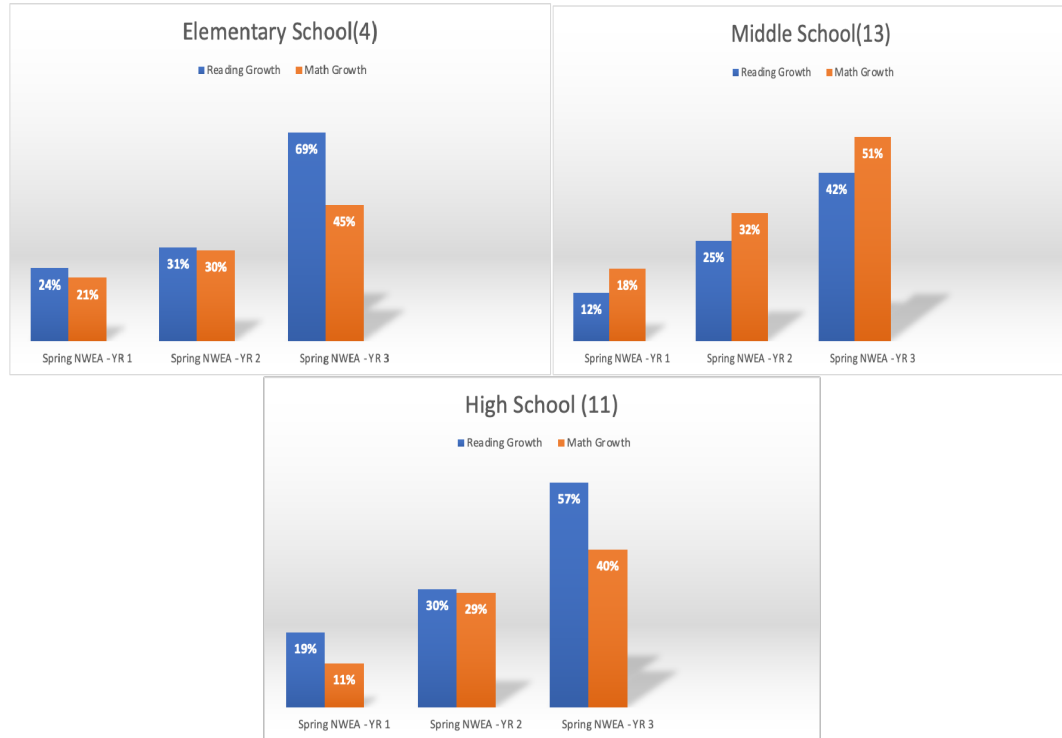
At capacity, Invictus Nashville will have an Elementary Director with two Assistant Directors and two Dean of Students. The Assistant Directors and Dean of Students will be split into Lower School (K-2), and Upper School (3–5). There will be a Middle School Director, two Assistant Directors, and two Deans of Culture. The two Assistant Directors will serve as Humanities and STEM coaches respectively. The Executive Director will manage the Directors and serve at the network level. At the network level, there will be a Director of Student Support Services and The Director of Community Expeditions and Partnerships.

The Invictus Nashville organizational chart at opening and at scale can be found in **Attachment G**.

2.4.B. Proposed Leader, Capacity, Development, and Evaluation

Proposed Executive Director Dr. Brenda Jones is a Build. Excel. Sustain. (BES) Fellow with several years of experience as a teacher, instructional coach, and assistant principal. She is a community co-design fellow that focuses on community input during the design process. Prior to becoming a fellow, Dr. Jones was a math teacher. As math teacher, Dr. Jones received Level 4 and Level 5 status for achievement with her students. As instructional coach, 100% of her teachers grew a level based on the final TEAM Evaluation Score. This indicates that a teacher’s students exceeded expected growth. This categorized her as a “highly effective” teacher.

In her current position as a School Success Manager, the coaching includes data analysis and action planning to support students and teachers based on that data analysis. She receives and delivers extensive training on Project-Based Learning that Summit Learning provides on their model. In addition, she has completed 3 residencies under Montessori leaders over the past year with more training lined up to support her development through the Arete Memphis Montessori Residency Program. **Figure 8** shows the Spring NWEA MAP results for schools after the first, second, and third years being coached by Dr. Jones. The blue represents reading, and the orange represents math. The results are the average based on data collected by the school leaders. As shown by the graphs, the elementary school students grew 45% in reading and by 24% in mathematics between Year 1 and Year 3. The middle school graph shows that students grew 30% in reading and 33% in math between Year 1 and Year 3. The final graph shows high school students grew by 38% in reading and 29% in mathematics. This is a great achievement due to it happening during the pandemic and across several state lines.

Figure 8**School Success Manager Data**

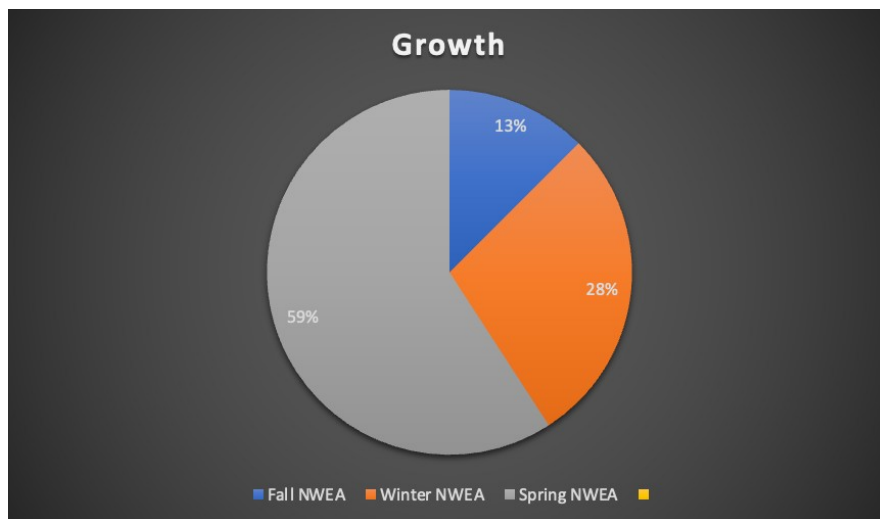
During the pandemic, Dr. Jones co-founded Nspire Tutoring Center. This center was for low-income families who could not miss work to help with virtual school during the pandemic. There were two accomplishments both academic and enrollment.

Table 59 shows the enrollment numbers by month. Under Dr. Under Jones' guidance, the center stayed at or above the goal of 24 students for 80% of the academic year despite schools phasing back in by grade level in October of 2020. The NWEA MAP scores are shown in **Figure 9**. The number of students that were on grade level increased significantly with each assessment. In addition, 100% Nspire students met their growth goal and 95% were promoted to the next grade level. The two students that were not promoted were based on our recommendation in conjunction with the parents and school.

Table 54**Nspire Enrollment per Month**

MONTH	ENROLLMENT NUMBERS	↑ INCREASE/DECREASE ↓
August	43	Increase
September	40	Decrease
October	24	Decrease

November	35	Increase
December	33	Decrease
January	37	Increase
February	32	Decrease
March	29	Decrease
April	23	Decrease
May	19	Decrease

Figure 9**Nspire NWEA MAP Scores**

As a BES Fellowship, Dr. Jones has grown her expertise in school leadership, finance, design, and management. She has completed 1200+ hours of BES training, school observations, and community outreach. We commit to supporting and developing all team members in leadership positions For the Executive Director, BES will provide Follow On support, which includes multiple site visits per year and comprehensive executive coaching from an experienced public-school leader. Dr. Jones is the lead applicant of Invictus Nashville and has included her resume in **Attachment F** with governing board documents and in **Attachment H** for previous student achievement data. The responsibilities for the Executive Director at Invictus Nashville follow:

Responsibilities

The tasks are assigned by the Board of Directors for the Executive Director. These tasks may include but are not limited to the following:

- ◆ Embody the mission and vision of Invictus Nashville.
- ◆ Communicate and report to the Board of Directors. Reports include but are not limited to the following:
 - Academics, operations, development, and community relationships.
 - Draft academic calendar and annual budget or Board approval.
- ◆ Complete Reports in conjunction with the Assistant Directors for federal, state, or private grant organization, including federal Title I LEA Plan.
- ◆ Coach, evaluate and support the Assistant Directors, Director of Operations, and Dean of Students to ensure mission alignment in:
 - Curriculum and pedagogy.
 - Professional development, coaching, and teacher onboarding.
 - Faculty, parent, and student engagement; and
 - Culture, DEI support, Mentoring Program.
- ◆ Oversee and participate in fundraising for Invictus Nashville to ensure the long-term financial health of the organization.
- ◆ Identify staffing needs, oversee employee hiring, development, promotion, progressive discipline, and/or dismissal.
- ◆ Ensure compliance with all applicable state and federal laws.
- ◆ Communicate regularly with parents which includes but is not limited to the following:
 - Recruitment of new families and students; and
 - Student academic and socio-emotional growth.
- ◆ Ensure that appropriate and equitable evaluation techniques are used for students and staff
- ◆ Establish sustainable systems in collaboration with the Director of Operations for collecting and reporting tasks. This includes but is not limited to the following:
 - Student records including attendance;
 - Health recording and immunization status.
 - Teacher records such as teacher credentialing information; and
 - Purchasing, budgets, and timetables.
- ◆ Ensure the security of the school building and the safety of students and staff.
- ◆ Manage student discipline and, as necessary, implement the suspension and expulsion process.
- ◆ Cultivate and sustain diverse community partnerships.
- ◆ Oversee hiring practices including:
 - Recruiting new faculty; and
 - Screening applicants during interview process.

Hiring Process—Administration

The following process will be implemented for hiring future Invictus Nashville leadership positions:

- ◆ **Application:** Applicants submit a resume and a letter of intent. The initial application includes open-ended response questions.

- ◆ **Phone Interview:** After reviewing an application, selected candidates will be invited to participate in a 30-minute phone interview with a member of the leadership team.
- ◆ **Performance Task:** The next stage will require candidates to complete a performance task. This can include but is not limited to the following: student achievement data, coaching video, data analysis.
- ◆ **Recommendation Letters and Reference Checks:** Three references complete a recommendation form on the candidate's behalf prior to a final interview.
- ◆ **Final Selection Interview:** Candidates invited to a Final Selection Interview will be engaged in dialogue with a committee of Invictus Nashville leaders, staff, and parent representatives. This is an in-person, full-day event where candidates have an opportunity to demonstrate instructional leadership, cultural leadership, and awareness of personal leadership identity and goals.

Administrator Support and Evaluation

Invictus Nashville administrators will be evaluated using the TEAM-TN Administrator Evaluation process.

The evaluation includes self-reflection, observation, input of school staff, and student data. The Board of Directors will use the following metrics in the annual performance review of the Invictus Nashville Executive Director:

- ◆ Meeting or Exceeding Academic Performance Goals
- ◆ Level 3 or Above on the TEAM Administrator Evaluation
- ◆ School Culture Surveys (Parent and Student Feedback)

Invictus Nashville makes the development of all staff a top priority. School leadership will receive ongoing coaching and feedback in her first two years of operation. through the BES Fellowship. The coaching will focus on strong coaching, board governance, data analysis, fund development, and cultivating diverse talents. In addition, school leadership will receive ongoing coaching and support from the Nashville Charter School Incubator. School leadership will participate in training provided by the district and if approved for grants through the CSGF and NSVF, school leadership will continue to receive coaching. As the school reaches middle school, the Summit Learning program will provide a school success manager. This person will offer ongoing training and bi-weekly individual coaching.

2.4.C. Timeline and Strategy for Staff Recruitment and Hiring

Employees whose positions require State licensure are required to maintain the appropriate active licenses as outlined by the State of Tennessee Office of Teacher Licensure. Our classes must have a teacher who has, or is making appropriate progress toward, relevant curricular credentials. The lead teachers in our elementary school must have Montessori credentials or other relevant training. Invictus Nashville will communicate appropriate training required for our model. Invictus Nashville will establish a partnership with Libertas School of Memphis who has a licensure program for Montessori diplomas pending approval. The program, Arete Memphis Public Montessori Residency, is a dual-certification program. The program is recognized as a Tennessee EPP and by the Montessori Accreditation Council for Teacher Education (MACTE).

We understand recruiting certified Montessori teacher poses a unique challenge, however, the demand for public Montessori schools across the nation and the increase in our population in Nashville will have the potential to draw talent locally and regionally, we plan to support these efforts with the partnership with Arete Memphis Public Montessori Residency, In addition, we plan to partner with organizations that will ensure a strong and diverse pipeline of candidates. The Invictus leadership team plans to pursue partnerships

with Tennessee Educators of Color Alliance (TECA), Belmont University, Vanderbilt University, Middle Tennessee State University, Tennessee State University, and Trevecca Nazarene University. The Invictus Nashville leadership team is in the process of establishing strong relationships with other institutions in the higher education community. The school will only need six lead classroom teachers in year one due to our slow growth model. The combination of the slow growth model and our partnerships will ensure that we keep a diverse pool of candidates to fill all positions within the school.

The Executive Director will be responsible for the hiring process of all site-based positions. **Table 55** outlines the hiring timeline from Y1.

Table 55

Hiring Timeline

TIMELINE	RECRUITMENT TARGETS
February–April 2023	<ul style="list-style-type: none"> Charter Application submitted and reviewed by MNPS.
July 2023	<ul style="list-style-type: none"> Charter Application approved and recruitment efforts begin (ongoing until all positions filled).
August–November 2023	<ul style="list-style-type: none"> Interviews, hiring, and background check for Director of Operations and Assistant Director. Multiple rounds of interviews for Lead K–1 classroom teachers.
December 2023	<ul style="list-style-type: none"> Reference and background checks for lead classroom teachers.
January 2024	<ul style="list-style-type: none"> Director of Operations and Assistant Directors begin in their roles. All lead classroom teachers hired.
February–April 2024	<ul style="list-style-type: none"> Multiple rounds of interviews for assistant teachers, K–1 classroom teachers, all other staff positions. Reference and background checks for apprentice classroom teachers, all other staff positions.
May 2024	<ul style="list-style-type: none"> All teachers and staff hired.
July 2024	<ul style="list-style-type: none"> Staff summer training. Operations staff finalizes preparations of building and systems.
August 2024	<ul style="list-style-type: none"> School opens with kindergarten-first grade.

In the years following launch, we will generally follow the timeline detailed in Table 56 for filling positions for the following year:

Table 56**Post Launch Hiring Timeline**

TIMELINE	RECRUITMENT TARGETS
Ongoing	Accept applications and Complete Initial Phone Interviews
September–December	Interview for expansion positions or known open positions for next school year
January–March	Retention conversations with current staffs Interviews reference and background checks for Lead classroom teachers or administrative positions; Offers made Interviews for Assistant classroom teachers all other staff positions
April	Reference and background checks for Assistant classroom teachers and other staff positions; Offers made
May–July	Ongoing application review and interviews until all positions filled Summer Training
August	Launch New School Year

Selection Criteria

Invictus Nashville will ensure that all teachers are licensed and considered “highly qualified” to comply with the Elementary and Secondary Education Act (ESEA). Invictus Nashville will seek evidence related to key competencies associated with success within our unique model. These competencies are as follows:

- ◆ **Competency.** This will be seen either through a teaching video or an in-person sample lesson. In addition, candidates can provide student achievement data. Does the teacher create a classroom with care and accountability? This can be demonstrated through a teaching video or in person.
- ◆ **Connection.** Does the candidate have a strong reason for wanting to work at Invictus Nashville?
- ◆ **Commitment.** Are they aligned with our key design elements, mentoring, community expeditions. etc. Do they embody the Habits of Success; specifically, the ones we want to develop in all staff? The prioritized Habits can be found in **Table 41**. Is the candidate receptive to feedback and an ability to incorporate it into their practice? Do they demonstrate commitment to continued professional growth?

All phases of the interview process will include key questions created to better understand the candidate capacity in each of these domains.

Hiring Process

At Invictus Nashville, we will follow a multi-step process to ensure that recruitment and hiring of classroom teachers and personnel will run smoothly and stay mission aligned. It is like the process described previously for Invictus Nashville school leadership positions:

- ◆ **Application:** Applicants submit a resume and respond to open-ended response questions to evaluate alignment with the school’s mission, vision, and unique design elements. .
- ◆ **Phone Interview:** After reviewing an application, selected candidates will be invited to participate in a 30-minute phone screen with a member of the leadership team. Phone interviews will have a scripted interview protocol to ensure consistency.
- ◆ **In-Person Interview and Demonstration Lesson:** Following a successful phone screen, candidates will participate in a full day in-person third round. If unable to attend in person, the candidate can submit an unedited video. Invictus Nashville leadership will determine if the circumstances are appropriate for the video versus the in-person visit. During the interview, the candidate will answer questions from a panel that includes school leadership, a teacher, a parent, a student, and when possible, a community partner.
- ◆ **Reference Checks:** Invictus Nashville will conduct complete and thorough reference checks which will include credentials verification.
- ◆ **Offer:** Candidates receive an offer of employment, contingent upon the completion of background check.

2.4.D. Ensuring Staff Diversity

Leadership

The proposed Executive Director, Dr. Jones, has demonstrated commitment to building diversity In both the Co-Design team and the Founding Board of Directors. The Co-Design team helped support community engagement and the design of the school 18 months prior to the submission of the application. The Founding Board of Directors have committed to diversity and removing access barriers to our proposed community and unique school vision. The school-based leadership team will aim to represent the diversity of the students we intend to serve. We will prioritize diversity in our hiring practices as the school grows to scale. The Invictus Nashville proposed Executive Director, Dr. Jones, through the Build, Excel, Sustain Fellowship engages in leadership development to support establishing Invictus Nashville as a diverse community of educational leaders ensuring that all applicants can engage in an equitable hiring experience.

Teachers and Staff

We believe that it is important for students to see themselves in Invictus Nashville teachers, staff, and community partners. This is directly aligned to our mission to help students find their unique path to personal and professional freedom. To pursue their dream, we are intentional about our partners and team of teachers. We are hyper focused during our community expedition weeks in ensuring that our students see themselves in the real world in many different ways. Therefore, it is important for our staff to represent this diversity and embody the passion for seeking out opportunities in their students to see themselves in all that we do. We will seek to hire teachers and staff of color from racial backgrounds reflecting those of all students at Invictus Nashville. Partnerships with organizations such as the Tennessee Educators of Color Alliance, Arete Memphis Montessori Residency, and multiple Universities will support us in providing access and opportunity for many diverse talents reflective of our community and allow us to develop alternative pathways to the teaching profession.

2.4.E. Staff Evaluation Model

Invictus Nashville will use the TEAM evaluation system for our staff evaluation process. The guidance document and training provided by the Tennessee Department of Education will be provided to our leadership team. The leadership team will ensure the process and content of conducting these evaluations are equitable and consistent with follow up training in house to account for our public Montessori classes at the elementary level. Please see the steps we will take to establish and implement an effective evaluation protocol for staff.

1. School Leadership will be trained to ensure that all leaders are certified TEAM evaluators. Leadership will be normed on the practices for the TEAM rubric.
2. We will provide all rubrics for evaluation for all staff and embed multiple opportunities for staff to ask questions about the process in relation to our unique design. We believe there should be transparency in the evaluation process.
3. We will conduct pre-conferences and post-conferences with fidelity. At Invictus, we will make sure that open dialogue drives towards teacher growth and increased student outcomes.
4. We will make all feedback notes in relation to conferences and rubrics available to teachers for continued reflection and growth.

Staff Observations

In addition to the evaluation rubric, each staff member will be assigned a coach from the Invictus Nashville leadership team. The coach will conduct frequent, brief observations of their assigned teachers using an Invictus Nashville Walkthrough Tool aligned with our norms for school culture explained in earlier sections of this application. Walkthroughs will be at least 30 minutes in length and will occur weekly until teachers reach a threshold score on the Walkthrough Tool. After that threshold is reached, the meetings will happen bi-weekly.

During the coaching meeting, teachers will discuss observation feedback, look at student work, and/or plan upcoming lessons. These meetings will employ a relationship-based approach that resembles the mentoring relationships that students should have with their assigned mentor teacher. Professional development at Invictus Nashville will be built upon trust and a culture characterized by continuous support and rigorous expectations. The coaching sessions will provide collaboration opportunities and will further ensure that coaches have sufficient context to evaluate classroom instruction during observations. In **Section 2.5**, there will be a more detailed explanation of our approach to professional development.

Elementary—Two Teacher Model Support

Assistant Teachers are classified at Invictus Nashville as teachers with less than three years of experience and/or do not hold the appropriate credentials to be considered a lead teacher. A key component of teacher development and support at Invictus Nashville is partnering assistant teachers with lead teachers. Assistant teachers benefit greatly from close mentorship and support of their partnering lead teacher(s). In our two-teacher model in the elementary school, Assistant teachers will develop opportunities to teach small groups, lesson plan, and improve classroom management practices. In all cases, classes will be led by at least one certified teacher of record. We anticipate a high teacher retention, therefore, there may be instances when we will partner two lead teachers together based on strengths and growth areas. We plan to leverage our partnerships to support Assistant Teachers who wish to become lead teachers. We will do this by ensuring that Assistant Teachers receive coaches and support in relieving the appropriate credentials. Students will benefit from the expertise of lead teachers and the energy and innovation of developing teachers.

Celebrating Excellence

Invictus Nashville will hold a winter and spring celebration for teachers to celebrate excellent teachers demonstrating outstanding commitment to our mission. Additionally, we will celebrate individual, team, and whole-school excellence in areas of academic performance, culture, and community engagement during our Quarterly Phoenix Meetings.

2.4.F. Unsatisfactory Performance

Invictus Nashville is prepared to address underperformance for teachers, leaders, and/or other staff in pursuit of fulfilling our mission. There is additional information about our school's personnel policies and a draft Employment Handbook in **Attachment I**. Our dismissal steps are provided below and will include the following but not limited to at-will employment contracts and school's authority to terminate employment for any reason, especially if any staff shows serious behavior that could cause harm to the school.

1. Employees will be provided immediate verbal feedback.
2. Employees will receive written documentation and explanation of the unsatisfactory performance with suggested corrective actions.
3. Coaches will develop a Teacher Improvement Plan (TIP). The TIP will detail the status of performance, identify target performance levels and dates, and an action plan for achieving the targets. The average TIP cycle will include quarterly evaluation meetings, and the progress on TIPs will be monitored in weekly coaching meetings.
4. If performance is still unsatisfactory at the second quarterly meeting, employment will be terminated.

Leadership Turnover

In the event of school leader turnover, an exit survey will be provided to determine the root cause and to inform our plan for a replacement. The following steps will take place:

1. Within five days, a plan for replacement, delineation of responsibilities between the Executive Director and Assistant Director will happen.
2. The Executive Director will resume the role of site-based leadership in the event of turnover.
3. The Executive Director and Assistant Director will launch a search for a replacement.

Teacher Turnover

In the event of lead teacher turnover, an exit survey will be provided to determine the root cause and to inform our plan for a replacement. The following steps will take place:

1. If the lead teacher is in the elementary school, the students will either be split among the remaining classes OR if the assistant teacher is certified he/she will resume the role. As a reminder, the elementary classes are a two-teacher model and mixed grade level. The classes can max out at 30 students.
2. If the lead teacher is in the middle school, the class will be split. We are projecting 20 student classrooms; this will increase the class size to 24.
3. All classes will remain split until a new teacher is found UNLESS it is deemed in the best interest of the staff and students to eliminate the disruption and leave students split for the rest of the year.

4. If splitting the classes is not an option due to larger enrollment, the Assistant Director will resume the role until a new hire is in place. This means that the Executive Director will take on most of the duties of the Assistant Director.
5. The Executive Director and Assistant Director will launch a search for a replacement and work with Assistant teachers to get the appropriate certifications to move into a lead teacher position.

2.4.G. Employee Benefits, Incentives, and Retention

Salaries are determined based on years of experience as well as additional qualifications and credentials. The salary growth will occur more rapidly the longer teachers are employed at Invictus Nashville to encourage retention. We will offer performance-based bonuses for staff at the end of each year based on achievement measures. The salary scale at Invictus Nashville is set to be competitive. Teachers that take on additional responsibilities will be offered stipends for their work. The additional responsibilities include but are not limited to the following: pilot programs, sports, or club activities, etc. All staff members will receive annual increases, and the scale will be evaluated annually to adjust for fiscal sustainability, cost of living, and competitiveness. Draft salary ranges can be found in **Table 57**. This table will be adjusted based on new salaries at the time of school opening.

Table 57**Invictus Nashville Draft Salary Scale**

YEARS OF EXPERIENCE	MNPS SALARY SCHEDULE	INVICTUS NASHVILLE SALARY SCHEDULE (ESTIMATED)	INVICTUS EXPERIENCE BAND
0	\$34,560*	42,000	Assistant Teacher
1	\$34,905*	42,630	Assistant Teacher
2	\$35,251*	43,269	Assistant Teacher
3	\$51,308	55,000	Lead Teacher
4	\$52,371	55,825	Lead Teacher
5	\$53,433	56,662	Lead Teacher
6	\$54,495	57,511	Lead Teacher
7	\$55,558	58,373	Lead Teacher
8	\$56,620	59,248	Lead Teacher
9	\$57,682	60,136	Lead Teacher
10	\$58,774	61,038	Lead Teacher

**The Assistant Teachers at Invictus Nashville do not have to be certified, therefore, they would be considered support staff. The "MNPS salary" that was calculated was based on the per hour rate for support staff at 12 months per year; 40 hours per week. The support staff at Invictus Nashville will not be hourly.*

Eligible staff members may elect to enroll in our different benefits programs that include medical, dental, and vision coverage with varied plan options. Rates are assessed annually to ensure costs are competitive with the local Metro Nashville Public School District. Invictus Nashville will offer generous parental and medical leave benefits. Teachers who have 3+ years of classroom experience and have sustained strong evaluations will be eligible to apply for teacher leadership opportunities in the school. The leadership opportunities include but are not limited to the following: grade-level team lead, department team leads, summer fellowships, etc. Stipends will be offered for these positions. These stipends will be paid in two installments—one at the pay period immediately preceding winter break and the final pay period of the school year (not fiscal year).

Invictus Nashville will work tirelessly to retain talented, high performing teachers through our unique design model and supportive culture. We understand that our mission, vision, and goals are ambitious and will require immense work, but we are committed to striking a healthy work-life balance for our staff to support both the professional and personal goals. We believe that our culture, financial incentives, and leadership opportunities will allow us to effectively retain our most talented teachers and staff every year.

2.4.H. Employment Contracts

Employees at Invictus Nashville will serve on an at-will basis. Based on the credentials and experience of each applicant, offers of employment will happen. The purpose of the employment offer will be to set clear performance expectations for the employee and the employer. Positions and contracts can be individually negotiated based on the overall experience of the applicant. Employment offers will be renewed on an annual basis. Employee renewals will be contingent upon satisfactory performance as measured by evaluations. Please see **Attachment I** for additional information on the Invictus Nashville Personnel Policies.

2.4.I. Employee Manual and Personnel Policies

The Invictus Nashville Employee Handbook can be found in **Attachment I**.

Table 58

Invictus Nashville Projected Staffing Chart

POSITION	START-UP	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8
Executive Director	1	1	1	1	1	1	1	1	1
Assistant Director	1	1	1	1	1	2	3	4	4
Director of Operations	1	1	1	1	1	1	1	1	1
Dean(s)				1	1	2	2	3	4
Director of Student Supports				1	1	1	1	1	1
Director of Expeditions and Partnerships				1	1	1	1	1	1
Lead Classroom Teachers		6	9	12	15	18	24	30	36
*Assistant Teachers		6	9	12	15	18	19	20	21
Related Arts		2	3	3	5	5	9	9	9
Special Education Teachers		1	1	2	2	3	3	3	4
Paraprofessionals			1	1	1	2	3	3	4
Office Managers		1	1	1	1	1	2	2	2
Total FTE	3	19	27	37	45	55	69	78	88
<i>*One assistant teacher will be EL certified. We will add one per year based on numbers.</i>									

2.5. Professional Development

In this section:

- Describe the expected number of days and hours for professional development throughout the school year and explain how the proposed school’s calendar, daily schedule, and staffing structure support this plan. Include time scheduled for collaborative planning and how such time will typically be used.
- Identify the person or position responsible for professional development.
- Describe the core components of your professional development plan and how those components will support effective implementation of the academic plan. Be sure to address the areas of special education and English learners, including implementation of individualized educational plans (IEPs), discipline of students with disabilities, and communication with EL families.
- Provide a schedule and overview of professional development that will take place prior to the school’s opening.
- Describe the training that will be provided to all staff on the topics of diverse, inclusive, and culturally relevant pedagogies.
- Describe the plan to cultivate future leadership capacity.
- Explain plans for differentiating professional development for different groups of teachers, such as new versus experienced teachers.
- Explain how the proposed school will provide orientation to teachers that are hired mid-year.

2.5.A. *Invictus Nashville Professional Development Overview*

At Invictus Nashville, we know that highly effective teachers have the highest impact on student success. Therefore, we have high expectations for our instructional staff that we combine with differentiated continuous support throughout the school year. We expect our teachers to pour into our students and meet their individual needs, and we plan to replenish their cups by meeting their developmental needs. To live up to this expectation, we will use our Summer Institute, Professional Development (PD) during expedition weeks, bi-weekly grade level/department meetings, and district provided professional development opportunities to support our staff. In addition, the middle school teachers will be provided professional development through Summit Learning three times per year to support implementation of their PBL model.

This will result in 21.5 full days of professional development and two additional hours of professional development each week which is over 300 PD hours across the school year. Our unique design models will make professional development essential for our academic and cultural goals at Invictus Nashville. As we bring the vision to life, it will be important that we continue to offer training to teachers surrounding our key design elements. Our coaching plan will drive academic results, cultural growth, teacher development, and student growth. The expected school calendar, including allotted professional development days, can be found in **Attachment A**.

Planning and Collaboration

In elementary school, the schedule has two work cycles. Internally, school-based leadership will arrange for planning periods to happen for K–5 teachers during specific points in the cycle and during related arts. Since the Montessori curriculum is taught in three-year grade bands, the lead teachers will go on planning at the same time while the co-teacher will lead a work session for ½ the class and the remaining students will attend related arts. This will happen for assistant teachers as well. In middle school, content teachers go on planning at the same time. There will be two math, two ELA, one science, and one history teacher per grade level. Bi-weekly Department will meet but on a daily basis, the math teachers will be able to plan collaboratively. At the beginning of the year, teams will inform leadership of their set co-planning week and department teams will select a day as well for their department meetings. On other days this planning period may be used for preparing lesson activities, grading student work, communicating with families, or meeting with a teacher’s coach.

The proposed Invictus Nashville Professional Development Plan explained in the following sections will effectively support the academic program by offering differentiated pathways to learning. In addition, the scheduling allows consistent and continuous follow of development throughout the academic year to maximize success. Sample topics are provided in different sections. Our PD will include academics, differentiation, data analysis, and support of special and diverse populations.

2.5.B. Staff Responsible for Professional Development

Invictus Nashville leadership which includes the Executive Director, Assistant Director, and Director of Operations are primarily responsible for coordinating professional development in our initial years. As we expand, Deans, Director of Student Supports, and the Director of Expeditions and Partnerships will also participate in planning and providing professional development. The leadership team identified above will collaboratively create the annual PD schedule and coordinate who will lead sessions. The leaders of the session will either internally schedule or schedule external PD providers. Directors of the ES and the MS will continue to own PD planning when we are at scale.

An integral part of our model is Community Expeditions. The process for vetting and recruiting these partnerships will be determined by the founding leadership team and approved by the Board of Directors. The Expedition Learning week will be managed by the school site leadership team. This leadership team in Y1 through Y2 will consist of Executive Director, Assistant Director, and Director of Operations. After Y3, the Director of Expeditions and Partnerships will take over the responsibilities of planning and executing the expedition weeks. Our staff will receive professional development as needed on the execution of the community weeks and ways to debrief with students in their mentoring groups. The goal is for students to use these weeks and make connections to their future aspirations. This time is also used for teacher data analysis and planning.

2.5.C. Core Components of Professional Development

The PD topics will be introduced during the Summer Institute and further developed over the academic year. **Table 59** provides the type and time commitment to our core PD offerings. Immediately following there will be a detailed description of each type of training that is offered at Invictus Nashville.

Table 59**Type and Time of Invictus PD**

TYPE OF PD	TIME COMMITMENT
Summer Institute	10 days in the summer
Summit Training	1 week in the summer
Weekly Professional Learning	31 PD afternoon ~ 62 hours
Bi-weekly Grade Level/Content Meeting	1 hour per week ~ 36 hours per year
Expedition Learning Weeks	17 days @ ½ a day PD ~51 hours

Summer Institute

All teachers engage in two weeks PD before the start of the new school year. The PD topics covered during the Summer Institute will be differentiated for new and returning staff, specialists, and by grade level and content as relevant to the launch of our school. The topics will include but are not limited to the following: school policies and procedures, planning for curriculum instruction such as Montessori and Project Based Learning, instructional strategies, discipline strategies, our mentoring approach, and family engagement strategies. This ensures that PD is targeted, meaningful, and directly applicable to practice. We will encourage and allow experienced teachers to provide teacher-led PD under the guidance of school leadership targeting identified areas of need or interest.

Expedition Learning Weeks

Invictus Nashville will have one week every quarter that students are immersed in community service and exposed to a variety of career paths, leadership workshops, arts, etc. with community partners. On a morning and afternoon rotation, staff will participate with students for half the day and for the other half they will participate in professional development and/or offer interventions for students that need additional support. The topics for PD will be determined based on need but generally they will cover instructional strategies, planning, analysis of student data, and serving students with diverse needs for both academic and school culture.

Biweekly Grade Level/Department Meetings

These meetings are designed as opportunities for teachers to examine student work, strategically plan for the next quarter, and receive professional development in analyzing and responding to trends in student academics which will include subgroups and culture data. The analysis of subgroups includes diverse and special populations. This will allow bi-weekly meetings to select areas of focus and use that time for professional development to help improve the outcomes for all students.

Weekly Professional Learning

The Invictus Nashville weekly schedule incorporates early dismissal of students on Fridays. Friday afternoons can be used for professional learning. Occasionally, this time will be flexible for teachers to

engage in lesson preparation or grading assignments as needed. These sessions will incorporate our DEI topics, meeting the needs of Diverse Learners, SIOP training for EL students, grading calibration, intervention planning, data analysis of testing. **Table 60** provides a sample schedule for these weekly professional development sessions for Quarter 1.

Table 60

Weekly PD Topics for Quarter 1

MONTH	SAMPLE FRIDAY TOPICS
August	<ul style="list-style-type: none"> ▪ First Friday <ul style="list-style-type: none"> ◆ School-Wide Culture ◆ Mentoring—Forming Attachment/Building Healthy Relationships ◆ Safety and Security Training ▪ Second Friday <ul style="list-style-type: none"> ◆ Grading Writing Samples—Montessori Training ◆ Project Based Learning—Rubric Calibrations for Scoring ▪ Third Friday <ul style="list-style-type: none"> ◆ SPED Planning (Accountability Sheets) ◆ RTI Analysis <ul style="list-style-type: none"> ● Grouping, Root Cause Analysis, Personalized Planning, Next Steps ▪ Fourth Friday <ul style="list-style-type: none"> ◆ Montessori Phonics ◆ Project Based Learning—Providing Feedback on Cog Skill Rubric
September	<ul style="list-style-type: none"> ▪ First Friday <ul style="list-style-type: none"> ◆ Montessori—Classroom Goals, Observation Sheets, GradeBook ◆ Project Based Learning—Using cog skill feedback to form small groups ▪ Second Friday <ul style="list-style-type: none"> ◆ Mentoring—Goal Setting and De-escalation Strategies ◆ Project Based Learning—Differentiation ▪ Third Friday <ul style="list-style-type: none"> ◆ SIOP training/instructional routines and best practices ◆ RTI Analysis <ul style="list-style-type: none"> ● Grouping, Root Cause Analysis, Personalized Planning, Next Steps ▪ Fourth Friday <ul style="list-style-type: none"> ◆ Montessori—Small Group Instruction—Differentiation ◆ Project Based Learning—Creating Workshops to Support Student Progress based on their performance.

Table 60, Weekly PD Topics for Quarter 1 (cont'd)

MONTH	SAMPLE FRIDAY TOPICS
October	<ul style="list-style-type: none"> ▪ First Friday <ul style="list-style-type: none"> ◆ Revisit the Montessori Scope and Sequence ◆ Revisit the Project-Based Learning Scope and Sequence ▪ Second Friday →ALL BREAK ▪ Third Friday <ul style="list-style-type: none"> ◆ Report and Gradebook Analysis <ul style="list-style-type: none"> ● Goals Progress ● Sub-group analysis ● Planning ▪ Fourth Friday <ul style="list-style-type: none"> ◆ School-Wide Culture (post break)

Summit Learning Training (Middle School Only)

Invictus Nashville plans to implement Project Based Learning by implementing the Summit Learning Model. Summit Learning provides training throughout the year. There is a one-week training during the Summer. The training covers project-based learning on their platform, mentoring, and self-directed learning. They also provide a two-day training in the Fall and the Spring to provide more training on the topics and specifically instructional practices based on the curriculum.

- ◆ The Summit Learning environment requires a fundamental change to the way teachers and students approach learning, in order to support this transition and lay the foundations for long-term success, provides ongoing support and coaching in the form of a dedicated Success Manager for the first four years of a school's participation in the Program. The school and the Summit Learning Success Manager meet virtually for at least 60 minutes bi-weekly, in addition to regular email communication.

2.5.D. Onboarding and Summer Professional Development

Invictus Nashville will use our Summer Institute to ensure a strong start to the academic year. This will set up our teachers to vigorously pursue our mission and vision with the appropriate tools. We propose a Summer Institute to lay a strong foundation each school year. Our founding Summer Institute will not have as much differentiation as in later years. This will allow our founding team to start on the same foot. We deeply believe that Summer Institute will create an environment that will push our mission and vision forward.

An overview of the onboarding process can be found in **Table 61**. The proposed daily schedule for Summer Institute can be found in **Table 62**. The proposed outline for Summer Institute can be found in *Error! Reference source not found.*

Table 61

Invictus Nashville Onboarding Overview

WHAT	WHO	WHEN	HOW	WHY?
HR Paperwork and Employee Handbook Review	This will be managed by Director of Operations. It will be completed by all new hires.	Employees will be provided this information after an offer letter is signed.	The Director of Operations will create paper and electronic folders with all new hire forms and handbooks.	The completion of these items are required prior to Summer Institute. This will allow us to maximize our time during Summer Institute.
Summer Welcome Event(s)	These events will be managed by the Director of Operations and Executive Director. All hired staff must attend at least one event.	These events will happen between the Lottery and First Day of School.	The Executive Director and Director of Operations will plan and summer welcome events for all students. Teachers attend so they can start to build relationships with students and families.	As a community school, establishing and building community is a top priority.

Table 62**Invictus Nashville Proposed Summer Institute Daily Schedule**

TIME	ACTIVITY
8:30–9:00	Team Building
9:00–10:30	Session I
10:30–10:45	Break
10:45–12:00	Session II
12:00–1:00	Lunch
1:00–2:30	Session III
2:30–4:00	Flex

Table 63**Invictus Nashville Proposed Summer Institute Outline**

WEEK 1	SESSION I	SESSION II	SESSION III
Monday	Team Building	Mission, Vision, Core Beliefs	Policies and Procedures
Tuesday	Safety and Security Training	DEI Session	DEI Session
Wednesday	Montessori Curriculum Overview	Scope and Sequence	Planning and Classroom Design
Thursday	Montessori—Instructional Practices	Child Study and Observation Protocol	Planning and Classroom Design
Friday	Team Building—Community Scavenger Hunt	School Culture Overview	Mentoring and Habits of Success
Week 2	Session I	Session II	Session III
Monday	SPED—Learner Variability	SPED—Inclusion	SPED—Differentiation
Tuesday	EL—SIOP Strands	EL—SIOP Planning	EL—Co-Teaching
Wednesday	IEP, 504, ELL Supports 2.0	Technology and Learning Systems	Routines and Rituals Modeling and Practice
Thursday	Student Orientation	Mentor Meet and Greet	Planning and Classroom Design
Friday	Student Orientation	Mentor Meet and Greet	Planning and Classroom Design

2.5.E. Equity Professional Development

Invictus Nashville Charter School will use our professional development model to provide our team with training in diverse, inclusive, and culturally relevant pedagogies.

Summer Institute

We will plan and facilitate sessions that explicitly cover diverse, inclusive, and culturally relevant practices and mindsets. It is a priority to have all academic offerings and material embed culturally relevant practices and methods. This mindset alignment begins during Summer Institute. We will hold more direct sessions that target diverse and inclusive practices, the celebration of diverse cultures, and sessions focusing on supporting the whole child, which will include our approach to character development through the Habits of Success and our Mentoring Program.

Friday Half Day PD

Invictus Nashville will have an early release day on Fridays. One Friday out of the month will be dedicated explicitly to continued training on diverse, inclusive, and culturally relevant pedagogies. These sessions will cover topics such as: self-identity, anti-racist practices, bias work, DEI best practices in academics, grading, behavior management, and parent communication. In our founding year, the Assistant Director and Executive Director will collaborate to plan these sessions internally or through an external partner. In Year 3 and beyond, our Dean of School Culture will work each month to identify the highest area of need for the school.

Full-Scale Coaching Model

Diverse, inclusive, and culturally relevant pedagogies will be a point of emphasis for our coaches in their coaching meetings with teachers. Coaches will ensure to connect these practices to student outcomes, instructional practices during observations, and teacher growth goals. A core component of the coaching meetings will be reflection. We will take on the belief that you cannot solve a problem in equity if you do not talk about that problem. These reflections will lead to healthy conversations around subgroup performance, representation in the curriculum, students who are being celebrated in class, students who might be impacted disproportionately by the behavior management in a classroom, etc. Coaches will work to build secure attachment with teachers so that meetings are safe and supportive.

Expedition Days

Every 7th week of a quarter is dedicated to Expedition Weeks. The Expedition days are split for teachers who will spend half the day participating in community activities and other half in professional development. The majority of the professional development will be dedicated to data analysis in classrooms, on assessments, and pertaining to culture. These Expedition Days will be incredibly valuable opportunities for us to step back and evaluate how students at Invictus Nashville are performing. We will use this data to assess our current support structures and plan best next steps to help

2.5.F. Cultivating Future Invictus Nashville Leaders

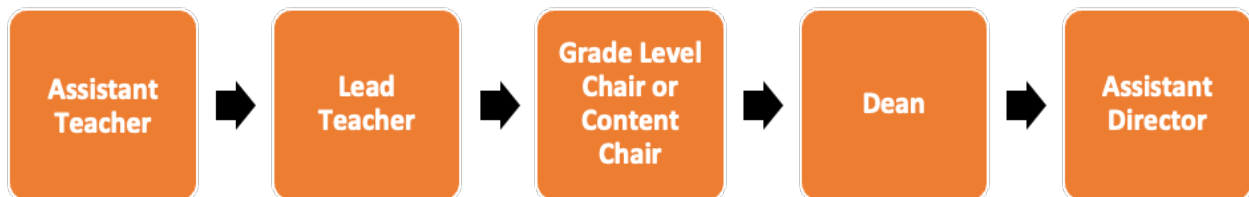
Invictus Nashville will have opportunities to cultivate leaders embedded into the structure of our school leadership model. Our academic model and approach to culture and discipline will require school leadership to have a deep understanding of our model across the leadership team. In addition, we know that excellent teachers are integral to student success, Therefore, we plan to support teachers with opportunities for professional growth and leadership that complement their classroom practice. The structure for cultivating leadership at Invictus Nashville will involve two pathways. The Teacher Leader Pathway will be for excellent teachers with the

professional goal to remain in the classroom while taking on additional responsibilities. These teachers will have a minimum of three years of teaching experience, and they should also have exemplary evaluations. The School Leader Pathway will be for teachers who are identified by Invictus Nashville leadership or self-identify their professional goal to become a school-level leader,

These Teacher Pathway Opportunities are described in more detail in **Table 644**. The School Leadership Pathway is found in **Figure 10**. Our growth and development opportunities and pathways will be personalized to each individual team member. It is also important to note that there could be overlap in the pathways and starting one will not impact a person's ability to transfer to a different pathway.

Table 64**Invictus Nashville Teacher Leader Pathway**

OPPORTUNITY	DESCRIPTION
Teaching Assignment— Differentiation	Teachers will be assigned different class sizes or content areas to maximize instructional effectiveness and/or pilot programs for Invictus Nashville.
Extended Contracts	Teachers are provided an extra month to work in the summer on an area of need that has been identified by school leadership.
Summer Fellowships	Teachers can apply for professional learning opportunities that are of interest to the teacher but also address a need in the school.
Instructional Leadership	Teachers may assume intermediate instructional leadership roles such as grade level chair, content chair.

Figure 10**Invictus Nashville School Leader Pathway****2.5.G. Differentiation in Professional Development**

Invictus Nashville’s leadership will approach adult learning with an understanding that teachers learn differently just as students. With that understanding, they will need differentiation for professional development. We will approach differentiation by ensuring our offerings differ for new and returning teachers, for specialists, and by grade level. Our Summer Institute calendar shares the general topics that will be covered. After our initial year in operation, the topics, such as sessions on Montessori best practices and our mentoring program, will have differentiated pathways for new and returning teachers. **Table 65** will provide examples of this differentiation. Specialists will have the opportunity to participate in differentiated internal or external PD.

Table 65

Differentiated PD at Invictus Nashville

PD TOPIC: MONTESSORI INSTRUCTIONAL PRACTICES	PD TOPIC: MENTORING
New Teacher: Introduction to uninterrupted work cycles and observations practices	New Teacher: Building Relationships, Habits of Success building secure attachment
Returning Teacher: All Levels—Child Case Studies, Level Meetings and Curriculum Setting	Returning Teacher: Trauma informed best practices, mentoring by building student autonomy

2.5.H. Midyear Hire Onboarding

Teachers that are hired mid-year will have a week-long onboarding. The mid-year hire will be guided by a member of the school-based leadership team. This includes an overview of our core values, mission and vision, and unique school model. In addition, they will have multiple opportunities to observe classrooms to learn the basics and get a feel for the curriculum, instructional approach, and discipline and culture systems. During the first week of teaching, the teacher will be paired with a mentor teacher to provide classroom support in the areas of technology or culture systems. In the case that a mentor teacher is not available, a member of the leadership will fill the role. The mid-year hires will be partnered with a coach who will provide ongoing support of their practice. If the mid-year hire is a middle school employee, they will be required to take the asynchronous Summit Learning professional development to get a foundation during their week-long onboarding.

2.6. Insurance

In this section:

- Charter schools must have appropriate insurance coverage. Applicants should check with their district to determine the necessary coverage amounts. As Attachment J, please provide the following:
- A list of the types and corresponding amounts of insurance coverage the proposed school will secure. Types of insurance should include, at a minimum, workers' compensation, employer liability, property, professional liability, surety bonds pursuant to Tenn. Code Ann. §49-13-111(n), and sexual abuse.
- A letter of coverage from an insurance company stating they will provide the required coverage upon approval of the charter application. The letter should include provisions for assuring that the insurance provider will notify TDOE within ten (10) days of the cancellation of any insurance it carries on the charter school, pursuant to Tenn. Code Ann. §49-13-107 (b) (19).
- *Note:* if the proposed school intends to have school athletics, additional liability coverage will be required.

2.6.A. Types of Coverage

The types of insurance coverage Invictus Nashville Charter School will obtain, and those coverage limits can be found in **Attachment J**.

2.6.B. Intent of Coverage

A letter of required coverage from Invictus Nashville Charter School's proposed insurance company can also be found in **Attachment J**.

2.7. Transportation

In this section:

- How will you daily transport the students to and from your proposed school, if applicable?
- How will you transport students to any extracurricular or after school activities, Saturday school, and/or field trips (where applicable)? Include budgetary assumptions and the impact of transportation on the overall budget.
- If applicable, outline your proposed transportation plan as follows:
 - ◆ Describe the plan for oversight of transportation operations (e.g., whether the proposed school will provide its own transportation, contract out for transportation, request that a district provide transportation, or a combination thereof) and who on the school staff will provide this daily oversight.
 - ◆ Describe how the school will transport students with special transportation needs and how that will impact your budget.
 - ◆ Describe how the school will ensure compliance with state and federal laws and regulations related to transportation services.
 - ◆ Explain how you will ensure compliance with Tenn. Code Ann. §49-6-2116
- If you are not providing transportation, describe how students will get to and from your school.

2.7.A. Daily Transportation

At Invictus Nashville, we pride ourselves on removing as many access barriers as possible to ensure that all our students find their unique path to professional and personal freedom. We do not anticipate all our students needing daily transportation, but we understand that lack of transportation is an access barrier. This results in inequitable access to school options, and we hope to be an excellent, innovative, and accessible option for Metro Nashville Public School students and families. Therefore, we plan to provide daily transportation to school, for all school community field events, and for as many after school activities as possible.

2.7.B. Extra Transportation and Budgetary Assumptions and Impact

Invictus Nashville will follow State Law and MNPS policy on bus transportation. This means we will be available to families who live more than 1.25 miles from school. For families who live within 1.25 miles from school, transportation will be the responsibility of their parents. We will have exceptions if we determine the area is unsafe for walking. We will determine the safety of the walking routes by May of 2024 to provide at least 2 months of planning for our Director Operations and families. We anticipate providing transportation services for about 50% of our students each year. This would be 72 students in Year 1 and 396 students at capacity. With this estimation, we will work to ensure that all students that need transportation to school are serviced. We will also provide busing for student with a disability and have included this assumption within

our budget. With up to 78 students per bus and a bus for students with a disability, two buses will be required in Year 1, increasing to six buses at capacity Grayline is the proposed transportation provider for Invictus Nashville. The key transportation cost assumptions are drawn from reported expenses of other charter schools. These cost assumptions will include bus driver salaries, fuel, and ongoing expenses. We estimate that it will cost \$375 per bus each day. This will equate to a yearly cost between \$65,000-\$70,000 per bus.

2.7.C. Proposed Transportation Plan

Invictus Nashville will ensure that the identified transportation provider will have the capability to provide services to students with disabilities as required by applicable law and have assumed the cost of these services within the overall assumptions presented above. Invictus Nashville will abide by state and federal regulations regarding transportation services for homeless students in accordance with the federal McKinney-Vento Homeless Assistance Act. Therefore, we will work with our selected transportation contractor during initial negotiations, contract development, and implementation to ensure that any student that meets the qualification of being homeless or temporarily displaced will be able to remain in school Pursuant to Tenn. Code Ann. § 49-6-2116. As mentioned earlier, we want to remove as many access barriers as possible and all our students regardless of status will have appropriate transportation.

Our Director of Operations will manage our transportation plan and services. This includes the contract and relationship with the contracted transportation service provider. This will include being responsible for monitoring and oversight of transportation plans and services of the school. The Director of Operations will ensure that buses, drivers/monitors, and routes all meet state and federal laws and regulations. The Director of Operations will maintain the records for bus maintenance, inspections, driver credentials, training records, and complaints. Complaints will be submitted via phone call, letter, or email to the Invictus Nashville Director of Operations. Following the complaint, Invictus Nashville will respond within 48 hours. Families will be informed of the complaint process each during orientation and it will also be provided in the Student and Family Handbook.

2.7.D. Alternative Plan for Student Transportation

Families may elect other forms of transportation for their students. Invictus Nashville will support the safe and efficient transportation of all students. Invictus Nashville will allow student arrival through car drop offs, public transportation, and walking. We will also have mentors serve as a liaison for families seeking carpooling opportunities. Identified families will be contacted by our Director of Operations for further support in making consistent transportation plans. Students arriving by car or walking will need to arrive at Invictus Nashville by 8:00 a.m. if they are eating breakfast. All students will need to arrive at school by 8:30 a.m. regardless of their transportation plan except for Fridays in the elementary school. Due to the abbreviated schedule, students will need to arrive no later than 8:00 a.m.

The proposed Executive Director has experience developing and directing safe and efficient arrival and dismissal procedures incorporating these multiple modes of transportation. In support of all transportation options. Additional hires to the leadership team will be required to have experience doing the same. We will work with all relevant stakeholders to map and provide signage as needed to promote the safe transportation of all students. This will help to establish Invictus Nashville as a respectful partner in the community.

2.8. Food Service

In this section:

- Describe the proposed school’s proposed food service plan and include the following:
- A clear description of how the proposed school will offer food service to the students, including how it will comply with applicable district, state, and federal guidelines and regulations. Include any plans to meet the needs of low-income students.
- How the proposed school intends to collect free and reduced-price lunch information from qualified families (including those schools that will participate in the Community Eligibility Provision).
- Describe how the food service vendor will be selected or, in the alternative, how the proposed school will provide meals in-house.

2.8.A. Food Services Overview

Invictus Nashville will provide a food service program in accordance and compliance with the nutrition regulations outlined in T.C.A. §§ 49-6-2301—2307. The school will ensure that all students will have the opportunity to participate in the school breakfast and lunch program daily. Invictus Nashville will provide a food service program on a contracted basis until we have a permanent facility and can provide our own food service program. The Director of Operations will manage and oversee the selected vendor. Invictus Nashville will seek bids from local food service providers. These providers have to provide the price per meal and the following: a reimbursable meal including milk, condiments applicable to the menu, serving utensils if applicable, packaging and containers needed to transport food in a sanitary manner, and transportation to and from the school if applicable. The bids that are submitted by potential vendors must include milk options in various fat contents as defined by current regulations of the National School Lunch Program.

Sample contract provisions with and expectations of the selected vendor will include:

- Maintaining Tennessee Health Department bi-annual inspection with a passing score.
- Having an HACCP program in place and be able to provide proof of that program.
- Maintaining daily individual meal food production records.
- Maintaining daily individual meal component documentation.
- Maintaining a “Buy American” provision.
- Maintain at least 21-day monthly cycle menus.
- Making appropriate accommodations for food allergies.
- Ensuring hot meals maintained at 140 degrees or above and cold meals at 40 degrees or below prior to and during transport and delivery.
- Providing meals that are individually packaged and sealed.
- All meals priced as a unit, meeting USDA requirements.

- Implementation of the “Traditional Menu Planning Approach”.
- Age-appropriate meals and menus; and
- Substitution of food components for a student with a disability if such disability restricts their diet (7 C.F.R. Section 15b).

2.8.B. Collection of FRPL Information

The Director of Operations will be responsible for working with staff and leaders to ensure that all parents and guardians complete the federal Free-and-Reduced Price Lunch Program to determine a student’s eligibility. The school will employ various strategies to ensure completion of appropriate forms by including them in initial student enrollment documentation, orientation materials, as a form in the Student and Family Handbook, through mentoring meetings, and distributed and available at all welcome events. The Director of Operations will begin an individual communication plan with families to ensure completion if our other strategies do not result in completion of the required documentation.

2.8.C. Selection of Provider

As mentioned above, the Director of Operations will oversee the process of bids from potential vendors. The DOO will vet those bids for the meeting of all requirements and will collaborate with school-based leaders and the Board to select the vendor that best supports student needs for nutritious meals, is fiscally responsible, and sustainable. The approval of a food service provider will occur through the Executive Director, who will then propose a vendor contract to the Board for final approval and contract engagement.

2.9. Additional Operations

In this section:

- Describe the proposed school’s plan for supporting the following operational needs:
 - ◆ **Technology:** List the technology that will be required to meet the academic and operational needs of the proposed school. Include any technology needed for classrooms, computer and science labs, library/media center, auditorium, main office, copy rooms, teacher work rooms, and other relevant spaces. Describe how the proposed school will ensure student access to the technology required for state-mandated assessments; include infrastructure requirements and costs in the budget section.
 - ◆ **Student information management:** Describe how the proposed school will ensure compliance with the Family Education Rights and Privacy Act (FERPA) and state regulations regarding student privacy and disclosure of student data and records.
 - ◆ **School health and nursing services:** Describe your plan for compliance with the Coordinated School Health Program, including any plans to hire a school nurse.
 - Include who at the proposed school will supervise the school nurse and his/her role in ensuring compliance with health regulations.
 - ◆ **Safety and security:** Describe your plan for ensuring the safety and security of students, staff, guests, and property. Identify the person or position responsible for school safety operations
- What will be the process and timeline for creating a school crisis plan?

2.9.A. Technology

Invictus Nashville will establish and maintain a wireless internet network infrastructure. Our elementary program will have classroom sets of laptops that can be checked out on a as needed basis. The carts will house 30 laptops. There will be one cart shared between three classrooms. We will schedule testing so that the rotation of the cart allows for assessments to be completed in a timely fashion. The middle school program will require more laptop devices to support a one-to-one technology. This will support student learning using the Summit Learning Platform and support required online testing for Tennessee exams. All classrooms will be equipped with a projector and a document camera to allow for the projection of internet research, modeling, the use of annotated texts, and discourse around student work. All spaces at our school will have wireless internet and the ability to print and copy on campus. Teachers will be provided a device for Invictus work but may elect to use their own.

2.9.B. Student Information Management

Invictus Nashville will stay in continual compliance with the Family Education Rights and Privacy Act through the followings:

- We will notify all students and families of their rights related to student records under FERPA on an annual basis. The rights that are included are as follows:

- ◆ The right to review education records;
 - ◆ The right to request amendments to education records; and
 - ◆ The right to have some control over the disclosure of personally identifiable information included in education records.
- Obtain signed, written consent from a parent or student over the age of 18 before any school official releases or shares personally identifiable information to a third-party entity.
 - Notify all faculty annually on the requirements and prohibitions of FERPA; onboarding training for new staff and office staff annually on student record sharing regulations under FERPA.
 - Annually review all third-party data sharing agreements to ensure all agreements comply with FERPA regulations.
 - Inclusion of FERPA-aligned privacy policies in all handbooks—Employee Manual in **Attachment B** and Student Handbook in **Attachment I**.
 - Staff signing of Confidentiality Agreement regarding the sharing of student information.

The Director of Operations will manage all student information systems (SIS). This includes the selection process for which SIS will be selected for use at Invictus Nashville. The Director of Operations will make certain student information is password protected according to job responsibility. The Director of Operations will lead all training for staff on FERPA rights. Per FERPA rights, the Director of Operations will respond to all educational records requests from families within 45 days.

2.9.C. School Health and Nursing Services

Invictus Nashville will operate in compliance with the Coordinated School Health Program. To do this, we will build a program that includes the following: healthy physical environments, encourages physical activity, healthy eating habits, provides health education, provides access to counseling services, and provides access to student health services. A registered nurse will develop individualized health plans for students that need it. The registered nurse will also manage immunization compliance, capture, and communicate essential medical information, train and support staff on first aid and caring for specific student needs and execute certain medical procedures that a student may require. The school Nurse will be managed within the school by the Director of Operations.

2.9.D. Safety and Security

Invictus Nashville will comply with all background check requirements laid out in § 49-5-413 for all staff and volunteers. Every hire will have fingerprinting completed before hiring offers are finalized. In addition, hires will have FBI and state criminal history and National Sex Offender Registry checks. The Director of Operations will review these checks every 5 years in accordance with Tennessee state law. There will be only one entrance/exit for visitors and all other exterior doors will be locked during school operating hours.

The Office Manager will control access to the school building by buzzing visitors, checking government-issued IDs, and maintaining visitor's logs. The Office Manager will provide all visitors with a Invictus Nashville pass. The pass will include the visitor's name, date, time, and purpose of their visit. School tours will be scheduled with the Director of Operations. The school will only dismiss students to parents or adults listed on a student's authorized pick-up list.

The Director of Operations will comply with all relevant laws and regulations, such as health and fire codes. The Director of Operations will organize efforts to ensure inspections of all building systems (i.e., fire alarms, sprinklers, elevators, etc.). In addition, the Director of Operations will conduct regular school walkthroughs and establish a maintenance request system to quickly identify and solve any potential hazards in the

building. The Executive Director and Director of Operations will develop the school's comprehensive emergency response plan during our planning year and review and revise that plan annually. Invictus Nashville will use the TN Department of Education's model plan as guidance and seek feedback from the Department of Education, Metro Nashville Police Department, and area fire marshal before implementing. The plan will include the following: identification of a school emergency response team, Incident command system, on and off campus emergency response protocols, and parent notification plans. This plan will be comprehensive. It will include protocols for incidents involving fire, weather emergency, evacuations, lockdowns, and shelter in places. The Director of Operations will equip every room with an emergency preparedness kit which has all procedures, important contact information, and student rosters when appropriate. The Executive Director will conduct a school safety and security self-assessment, staff safety and security training every year. The Director of Operations will conduct monthly student drills.

2.9.E. School Maintenance

Invictus Nashville will maintain a janitorial contract for daily cleaning requirements. However, we will hire a property management company to provide maintenance services. If the property management company does not directly provide the services they will hire and manage vendors to provide both preventive maintenance and reactive services, these services include but are not limited to the following: plumbing, electrical, grounds keeping, HVAC, and structural supports.

2.9.F. Additional Operations

Not applicable: No additional operations to note.

2.9.G. ASD Operator

Not applicable: Invictus Nashville is not an ASD operator.

2.10. Charter Management Organization (if applicable)

In this section:

- If you intend to contract with a charter management organization (CMO), please detail:
 - The name of the CMO, if known, and evidence of its educational and management success;
- Selection process and criteria;
- Scope of services and resources to be provided by the CMO;
- Division of roles and responsibilities between the board and the CMO, disclosure and explanation of any existing or potential conflicts of interest between the board and CMO, and how conflicts of interest will be checked;
- How performance of the CMO will be measured, including any deliverables;
- Conditions for renewal and termination of the agreement;
- Any monetary obligations of the CMO agreement; and
- Include a copy of the CMO agreement as Attachment K, if available, that sets forth proposed key terms, including roles and responsibilities of the school governing board, the school staff, and the service provider; the services and resources to be provided; performance-evaluation measures and mechanisms; detailed explanation of compensation to be paid to the provider; financial controls and oversight; investment disclosure; methods of contract oversight and enforcement; and conditions for contract renewal and termination
- For an existing ASD operator contracting with a CMO, in lieu of the above, include a copy of the CMO agreement as Attachment K.

Not applicable: Invictus Nashville will not contract with a CMO.

2.11. Waivers

In this section:

- Pursuant to T.C.A. § 49-13-111, a sponsor of a proposed charter school may apply to either the authorizer or to the Commissioner of Education for a waiver of any state board rule or statute that inhibits or hinders the proposed charter school's ability to meet its goals or comply with its mission statement.
- Waivers may not be granted for requirements related to:
 - ◆ Federal and state civil rights;
 - ◆ Federal, state, and local health and safety;
 - ◆ Federal and state public records;
 - ◆ Immunizations;
 - ◆ Possession of weapons on school grounds;
 - ◆ Background checks and fingerprinting of personnel;
 - ◆ Federal and state special education services;
 - ◆ Student due process;
 - ◆ Parental rights;
 - ◆ Federal and state student assessment and accountability;
 - ◆ Open meetings; or
 - ◆ At least the same equivalent time of instruction as required in regular public schools.
- Please list all requested waivers below:

Table 66 contains all waivers that Invictus Nashville is applying for in order that align with our mission and vision and to meet our goals.

Table 66

Invictus Nashville Waivers⁸¹

T.C.A. CITATION AND/OR STATE BOARD OF EDUCATION RULE	DESCRIPTION OF STATUTE	PROPOSED REPLACEMENT POLICY OR PRACTICE	HOW THIS WAIVER WILL INCREASE STUDENT ACHIEVEMENT
T.C.A. §49-3-306(a); SBE Rule 0520-01-02-.02	Licensed Personnel Salaries	Invictus Nashville Board approves salaries during annual budgeting process.	Student achievement will increase by ensuring every year that our payroll system reflects the purpose, mission, vision, and philosophy of Invictus Nashville. This will also show that all public dollars are used properly with all personnel being paid adequately and on time.
T.C.A. §49-3-306(a); SBE Rule 0520-01-02-.02	Licensed Personnel Salaries	Invictus Nashville Board approves salaries during annual budgeting process.	Student achievement will increase by ensuring every year that our payroll system reflects the purpose, mission, vision, and philosophy of Invictus Nashville. This will also show that all public dollars are used properly with all personnel being paid adequately and on time.
T.C.A. § 49-5-401	Teacher Assignment	Invictus Nashville Board approves annual calendar, school salaries and teacher assignments.	Invictus Nashville may utilize an extended schedule that includes increased instructional and professional development hours. Teachers will receive compensation commensurate with their work hours.
T.C.A. §49-5-501-513	Tenure	Invictus Nashville Leadership will oversee performance evaluation.	Invictus Nashville is a results-driven organization. Therefore, all employees of Invictus Nashville will be at-will employees.
T.C.A. §49-5-101(a); SBE Rule 0520-1-2-.03 (6)	Licensed Principals	Invictus Nashville leadership will participate in internal training & skills development.	Invictus Nashville will internally train school leaders in alignment with our unique mission and approach and will recruit the most qualified leaders to fulfill its mission.

Table 66, Invictus Nashville Waivers (cont'd)

T.C.A. CITATION AND/OR STATE BOARD OF EDUCATION RULE	DESCRIPTION OF STATUTE	PROPOSED REPLACEMENT POLICY OR PRACTICE	HOW THIS WAIVER WILL INCREASE STUDENT ACHIEVEMENT
T.C.A. §49-3-316	Local Fiscal Accounting	Invictus Nashville Board approves the budget during annual budgeting process	It is imperative that fiscal management systems reflect the school's mission and vision. In addition, it must ensure that all public dollars will be used properly, that all non-waived regulations are met, and that all operations stand up to a financial audit.
T.C.A. §49-6-2206-2207	Use of Unapproved Textbooks	The Invictus Nashville Board will approve the use of all curricular materials	The Invictus Nashville curriculum and instructional approaches will always be grounded in our mission and vision. The uniqueness of that vision will require the use of both state-approved textbooks and other unapproved instructional materials.
SBE Rule 0520-01-03-.07 (1-2)	Classroom Libraries	Invictus Nashville schools will provide students with access to classroom libraries	A substantial library will be available to students at the nearest public library. This facility will be augmented by classroom libraries.
T.C.A. §49-3-311	Capital Overlay	The Invictus Nashville Board will approve all facility contracts and leases	Facilities will pose a great challenge because charter schools must finance their own buildings and do not have the power to raise taxes to fund capital outlay. It is critical that Invictus Nashville gain freedom from non-health and safety standards for the school site and have control of the facility vested by the Invictus Nashville Board, rather than the city board of education. This freedom will allow us to use the school site resources most effectively and align building choices with the Invictus Nashville mission and goals.

Table 66, Invictus Nashville Waivers (cont'd)

T.C.A. CITATION AND/OR STATE BOARD OF EDUCATION RULE	DESCRIPTION OF STATUTE	PROPOSED REPLACEMENT POLICY OR PRACTICE	HOW THIS WAIVER WILL INCREASE STUDENT ACHIEVEMENT
T.C.A. §49-5-501-513	Tenure	Invictus Nashville School Leadership will oversee annual performance evaluations	Invictus Nashville is a results-driven organization. Therefore, all employees of Invictus Nashville will be at-will employees.
T.C.A. § 49-6-1021	Opportunities for Physical Activity	Invictus Nashville Leadership approves annual calendar and school schedules including time for student health and well-being through physical activity.	Students will be involved in physical education activities each week. The Director will oversee these classes and work to ensure that the PE curriculum meets state content standards.
T.C.A. § 49-5-408-409	Evaluation Contracts and Termination of Contracts	Invictus Nashville oversee performance evaluations through Invictus Nashville and leadership processes.	A key to Invictus Nashville's success is being able to attract and retain staff that is committed to our mission and to provide them with the motivation necessary to get the job done. It is essential that Invictus Nashville can design hiring, pay, benefits, promotion, and evaluation systems that are aligned with our mission and goals. Every teacher will be assessed based on their performance. Teachers, who attain the required levels of performance, as outlined in their performance management goals, will be offered an opportunity to remain on staff.

Table 66, Invictus Nashville Waivers (cont'd)

T.C.A. CITATION AND/OR STATE BOARD OF EDUCATION RULE	DESCRIPTION OF STATUTE	PROPOSED REPLACEMENT POLICY OR PRACTICE	HOW THIS WAIVER WILL INCREASE STUDENT ACHIEVEMENT
T.C.A. § 49-3-359(a)	Instructional Materials and Supplies	The school will provide all classroom materials for students, including notebooks, folders, pencils, etc. The Invictus Nashville Director of Operations will oversee school procurement of all supplies, furniture, and all other needs.	The Invictus Nashville budget sufficiently meets the needs of classroom supplies. Teachers will also have the ability to request special supplies through centralized ordering and management by the Director of Operations. This will cut down on the need for teacher personal spending and reimbursement.
SBE Rule 0520-01-02-.04	Leave for Teachers	Invictus Nashville will set its own leave policies in compliance with all state and federal laws, which will be approved by the Invictus Nashville Board.	Invictus Nashville leave policies will balance both the needs of teachers and those of students by minimizing disruptions to student learning.
T.C.A. § 49-6-303(a)(1) Sate Board policy 5.1.03 – School Counseling Model and Standards State Board policy 5.502 – Educator Licensure, Section (5)(d) SBE Rule 0520-02-03-.05(5)	School Counseling	Invictus Nashville will have the flexibility to hire	This waiver will provide the school with the flexibility needed to properly staff the school, including many Montessori trained teachers, the opportunity to hire a mental health counselor or certified social worker as a school counselor when needed.

2.11—2.16

Not applicable.

3.1 and 3.2

Section 3.1, Planning and Budget Worksheet, and *3.2, Budget Narrative*, can be found in *Attachments N* and *Attachment O*.

ATTACHMENT A: ANNUAL ACADEMIC CALENDAR

Invictus Nashville Academic Calendar 2024- 2025

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7/22 - 8/2	Summer Teacher Academy	11/15	Progress Report	3/7	Teacher In-Service
8/5	First Day of School (FDOS)	11/25 - 11/29	Thanksgiving Break	3/10 - 3/14	Spring Break
9/2	Labor Day	12/2 - 12/6	Expedition Week - Q2	4/17	Progress Report
9/6	Progress Report	12/23 - 1/3	Winter Break	4/18	Spring Holiday
9/16	School Service Day	1/6	Teacher In-Service	4/28	School Service Day
9/17 - 9/21	Expedition Week - Q1	1/20	Martin Luther King Jr Day	4/29 - 5/2	Expedition Week - Q4
10/4	End of Quarter 1	2/7	Progress Report	Calendar Key	
10/7 - 10/11	Fall Break	2/17	School Service Day		Teacher In-Service
11/11	School Service Day	2/18 - 2/21	Expedition Week - Q3		Students in school
					Students out of school
					Student Service Day
					Expedition Weeks
					Leadership Stepback

ATTACHMENT B: STUDENT HANDBOOK



Invictus Nashville Charter School
Student Handbook
2024—2025

SECTION 1. INTRODUCTION AND INVICTUS MODEL

1.1. Director's Welcome + Handbook Purpose

Welcome to Invictus Nashville Charter School! We're excited to have you on our team and look forward to your many contributions toward our mission.

“Invictus Nashville will prepare our K–8 students to become engaged members of society by helping them identify their unique path to personal and professional success. Through a diverse culture, personalized learning, and community service, Invictus Nashville graduates will be equipped with the necessary habits of success and a heart for service in their communities.”

This Community Handbook provides an overview of important policies and procedures that will ensure we maintain a positive, safe, and productive school culture. This includes both rigorous academics and holistic care for students. Please set aside some time to carefully review this handbook as a family and keep it handy so you can refer to it when needed. Keep in mind that this handbook is a living document and will be revised each year. The most current version can always be found on the Invictus Nashville School website. You will review this document with your child's mentor before the start of the year, and at this time will submit a signed form acknowledging review of all items contained within this handbook. Please always feel free to contact your child's mentor and/or Invictus Nashville leadership should you have any questions about policies and procedures at Invictus Nashville.

We look forward to the learning adventure we have ahead this year and are so thankful to have you on board!

Warm regards,

Dr. Brenda Jones

1.2. Achieving Our Vision

Invictus Nashville is a public K–8 charter school grounded in the belief that one size does not fit all students and families. Our school model focuses on holistic development. We have carefully constructed a model that drives towards academic achievement for all students, empowers students to impact their communities, and continuously supports each child’s character development. The vision for achieving our mission is built around four key elements of our school model:

Our vision and design are consistently informed by our core beliefs in what it will take to make our mission a reality.

- 1. Students and their families should be active participants in decisions about their education and future aspirations. Academic and character development, supported by social emotional learning, has demonstrated learning benefits for students. We propose a model that provides weekly one-to-one mentoring for students. These mentors will also provide direct support to parents and ensure that they are informed of their student progress. We will bring all stakeholders in a child’s development to the planning table when working on character development to ensure both consistency in this work and cultural congruence.**
- 1. Diverse and applicable experiences better prepare students for the real world.** This belief grounds all that we do. It influences our curriculum that encourages our students to explore and discover, to collaborate with classmates, and to take ownership of their education. The embedded expedition week encourages self-directed learning that promotes self-confidence, independent thought and action, and critical thinking, while fostering social-emotional and intellectual growth.
- 2. There are habits needed to thrive upon graduation that apply in both college and careers.** The Habits of Success framework was designed with an understanding that foundational skills are prerequisites for higher-order skills; skill development happens on a developmental pathway that integrates cognitive, social, and emotional skills. The framework acknowledges that children do not always get the same start in life and do not all follow an identical path. It helps provide guidance to educators on how to support students who have experienced trauma and other adverse circumstances.
- 3. Every student should know and believe that the world is bigger than their neighborhood, state, or country.** We believe deeply that at this level, the teaching of peace, social justice, and global citizenship is based on fostering respect for all people and living things, and helping children learn the tools for peaceful conflict resolution. The combination of our curriculum and a focus on community service will ensure character development happens best in the community. We believe our school will invest young people in the Nashville community and will lead to dynamic, long-term growth of our city.

1.3. School Calendar

2024—2025 School Year

Invictus Nashville Academic Calendar 2024- 2025

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7/22 - 8/2	Summer Teacher Academy	11/15	Progress Report	3/7	Teacher In-Service
8/5	First Day of School (FDOS)	11/25 - 11/29	Thanksgiving Break	3/10 - 3/14	Spring Break
9/2	Labor Day	12/2 - 12/6	Expedition Week - Q2	4/17	Progress Report
9/6	Progress Report	12/23 - 1/3	Winter Break	4/18	Spring Holiday
9/16	School Service Day	1/6	Teacher In-Service	4/28	School Service Day
9/17 - 9/21	Expedition Week - Q1	1/20	Martin Luther King Jr Day	4/29 - 5/2	Expedition Week - Q4
10/4	End of Quarter 1	2/7	Progress Report		
10/7 - 10/11	Fall Break	2/17	School Service Day		
11/11	School Service Day	2/18 - 2/21	Expedition Week - Q3		
					Calendar Key
					Teacher In-Service
					Students in school
					Students out of school
					Student Service Day
					Expedition Weeks
					Leadership Stepback

1.4. School Hours

The school day for students in the Invictus Nashville Elementary school begins at 8:05 and dismisses at 3:05 Monday-Thursday and at 1:05 on Friday. The school day for students in the Invictus Nashville Middle school begins at 8:30 and dismisses at 3:55 Monday-Thursday and at 1:55 on Friday. Punctuality is important and ensures that instructional time for students is protected and prioritized each day at Invictus Nashville.

Punctuality is an important value that demonstrates respect for Invictus Nashville staff and the engaging learning activities that students experience each day at school.

Invictus Nashville offers before and after school care to accommodate parents' work schedules. The projected schedule will be 7:30-8:15a.m. for morning care, and 3:00-6:00 p.m. Before and After Care will be paid for by parents on a sliding scale with scholarships supplemented by Invictus Nashville.

In case of inclement weather, school hours may be impacted:

1.4.1. School Closing

Occasionally, weather conditions will cause schools to open late, dismiss early, or close altogether. If we are experiencing or expecting severe weather, please monitor the MNPS Website (<http://www.mnps.org>) or our local television and/or radio stations for the latest school closing information. Please do NOT call the school for this information. Invictus Nashville follows the Metropolitan Nashville Public Schools (MNPS) plan for school closings. If MNPS schools are closed, we will also be closed. If MNPS is closed for more than one consecutive day, please check the local news each night to see if Invictus Nashville will open. Sometimes MNPS bus routes are inaccessible, but bus routes are clear to our school after one day. In these cases, where MNPS cannot open but we can, we will send a text or call to families as well as post our opening on local news.

1.4.2. Early Dismissal

If inclement weather causes an early dismissal, we will notify all parents through a phone call in addition to the posting on MNPS's website. Invictus Nashville will follow the regular daily schedule until the time that students need to be dismissed early. Classes will continue the regular length of time, and students may miss some classes scheduled for the end of the day.

1.5. Staff Directory

Name	Role	Contact
Dr. Brenda Jones	Executive Director	bjones@bes.fellow.org
To be completed upon hiring the founding team		

SECTION 2. ACADEMICS AT INVICTUS NASHVILLE

2.1. Standards

Tennessee Academic Standards provide the foundation for all learning activities at Invictus Nashville. The standards are what we learn at Invictus Nashville, our curricular projects and instructional methods are how we learn, and our global competence focus provides the why for our learning activities and approach, including our dual language instructional methods.

2.2. Curriculum and Instructional Methods

Our instructional methods blend practices of progressive, child-centered Montessori, Reggio, and Project Based Learning educational approaches with best practices for promoting equitable outcomes for all students, including students with special needs and English language learners.

We pride ourselves on making the appropriate developmental decisions for our students based on research. This is why our Elementary School uses the Montessori Curriculum and the Middle School transitions to the Summit Learning Project-Based Learning Curriculum. At Invictus Nashville, the structure of the school day in elementary school extended work cycles. All students in the elementary school participate in two extended daily work cycles of between 2-3 hours, one in the morning and one in the afternoon. All of the elementary courses are led by the two teachers; one is the lead and other is an assistant.

An important element of Invictus Nashville work cycles are the four freedoms that help our students develop independence, intrinsic motivation, and confidence as leaders of their own learning. These four freedoms are automatically given to students unless they demonstrate that they need additional support or structure:

1. **Freedom to choose where to work**
2. **Freedom to choose how long to work on each task**
3. **Freedom to choose who to work with**
4. **Freedom to choose what order to do their work in**

Instruction in Invictus Nashville work cycles at all levels incorporates research-supported best practices designed to provide individualized and equitable learning opportunities and to maximize student voice and independence.

The curriculum in middle school is a Project-Based Learning curriculum called Summit Learning. Our PBL model will lead to deeper cognition and longer-term mastery of state learning targets because of the flexibility and nuance required to apply learning to real world contexts. Invictus' PBL modules will stretch student thinking across contents while simultaneously offering a greater variety of access points that ensures planning for diverse learners.⁶² Layering on opportunities for community service and expeditionary learning weeks with our PBL model will ensure that students connect their classroom learning to community impact, as well as offering real world opportunities for SEL and character development growth.

Our main instructional practices are outlined in the following table:

Invictus Nashville Instructional Strategies

Literary Instructional Methods	
Interactive Read Aloud (K–5)	Using CKLA—This Interactive Read Aloud is an effective strategy for whole-group literacy

	instruction, and can also be an engaging manner for introducing topics in other content areas through narrative or nonfiction texts. The teacher reads from an engaging text and periodically prompts students to turn and talk to each other about their thinking as they listen to the story. The teacher models important skills or understandings that the students will explore and practice independently after the Interactive Read Aloud.
Guided Reading (K–8)	Benchmark Assessments inform student grouping by instructional level or target skill. While reading a common book at an appropriate level, guided reading groups will meet regularly with the teacher to complete activities relating to phonics, comprehension, features of the text, and word study.
Writing Workshops (2–8)	The Writing Workshop is a student-centered approach to process writing in which students spend extended periods of time working on process pieces from different writing genres. With support from the teacher throughout the process, they have the ability to select their own topics for their writing and work together with classmates to revise and develop their work. During the writing workshop students may also engage in direct instruction and conferences on writing skills, grammar, and spelling.
Word Study (K–5)	After completing the Developmental Spelling Assessment at the beginning of the year students are grouped for instruction in phonics and spelling skills. Each week the word study group completes self-directed and collaborative activities with a targeted phonics or spelling pattern.
Collaborative Approaches to Comprehension (6–8)	Collaborative approaches are structured, discussed-based methods for joint processing of text. They can be used by a teacher with a student or group of students, and are a method to scaffold student comprehension during reading. Researched methods include Peer-Assisted Learning Strategies (PALS), Reciprocal Teaching (RT), and Questioning the Author (QtA). These methods harness the instructional and motivational power of discussion and peer collaboration, while providing structured methods that are easily taught to students, and a light planning burden for teachers.
Math Instructional Strategies	

Sense Making (K–8)	This approach to mathematics instruction focuses on understanding processes and strategies that lead to effective problem solving. Sense Making provides students with multiple opportunities to build and demonstrate mastery of Mathematical concepts and skills.
Guided Problem Solving (3–8)	Seminar & Math Meetings—Students work in groups with the teacher to practice specific mathematical concepts and processes.
Shared Problem Solving (K–8)	Students work together with peers to apply mathematics to solve challenging real-world problems. Collaboration with others and sharing multiple solutions allows students to build greater connections to mathematics.
Independent Math (K–8)	Students have an opportunity to independently learn and apply math concepts to solve problems.
Math Games (K–8)	Students build confidence and develop positive attitudes towards math as they apply math skills and processes to math games.
Instructional Strategies for All Content Areas	
Direct Instruction (K–8)	The teacher teaches, models, or demonstrates a concept or process to be explored and implemented by students.
Use of Manipulatives (K–8)	Dr. Maria Montessori affirms that “What the hand does the mind remembers.” We will incorporate hands-on learning opportunities in all content areas through the use of hands-on materials including math manipulatives, Montessori literacy materials, and science experiments.

2.3. Academic Grades and Report Cards

Report Cards are issued to parents at the end of each quarter. The purpose of the Invictus Nashville report card is to communicate student achievement in relation to mastery-based academic goals for the marking period and social emotional learning. Report cards provide a comprehensive picture of student progress in becoming lifelong learners and contributing members of the Invictus Nashville learning community.

2.4. Homework Policy

Homework may be assigned on a weekly basis. Students will be clearly notified when they are expected to return homework assignments. All students are expected to read “just right” books every evening for an appropriate amount of time given their grade level. In addition to reading, students may be assigned specific homework tasks.

Practicing skills and researching topics introduced in class, preparing for upcoming lessons or tests, applying or extending concepts already learned, are among the purposes for homework at Invictus Nashville. Homework always builds on concepts introduced in class and helps students develop independent study habits and learn how to manage their time. We expect homework to be a reflection of the child’s effort and abilities with minimal adult assistance, as this provides the most accurate and helpful picture of the students’ learning needs.

2.5. Make-Up Work

If a student misses a day or block of the day, graded work must be made up at another time. The mentor and teachers will determine the appropriate amount of time for the student to complete missing assignments.

2.6. Academic Dishonesty

Acts of academic dishonesty, including plagiarism, stealing tests, copying themes or tests from other students or using notes or tapes are considered serious offenses. Students are expected to use good digital citizenship when using technology. A student charged with academic dishonesty is subject to probationary status, suspension and/or expulsion. A student contributing to another student’s act of dishonesty is considered to be equally at fault. Progressive discipline will be used. Please discuss with a staff member if you observe a student engaging in academic dishonesty.

2.7. Special Education

All Invictus Nashville students with disabilities are provided services and programs as prescribed by their Individualized Education Plans (IEPs). All services and placement decisions are made by the IEP team based on the individual needs of the student. Invictus Nashville employs an inclusion model to provide students with appropriate educational services in the least restrictive environment, so most Invictus Nashville students with an IEP or Individual Learning Plan (ILP) will receive services within the context of the general education classroom with targeted interventions by specialists. A full-inclusion model allows students to receive individualized and small group instruction within the general education classroom setting, and provides significant academic and social benefits to both students with IEPs and their typically developing peers.

Our learning approach and daily school schedule are optimally designed to provide students with equitable academic support, interventions, and enrichment to meet their individual needs. We are dedicated to providing a learning program that allows all students to experience success and growth as learners and members of the Invictus Nashville community. Adaptation and modifications of assignments, assessments, and the classroom environment are provided as indicated by the student’s IEP or ILP. Special assessment accommodations will be given during state/district assessments.

A Day at Invictus Nashville—Elementary

Time	Instructional Activities
7:45—8:00	Arrival
8:05 -8:35	Mentoring & Breakfast <ul style="list-style-type: none"> • Optional Before Care (breakfast, free play) • Mentor House meet classmates activities to reinforce habits of success, social and emotional skills, and character traits
8:40—11:40	Morning Work Cycle <ul style="list-style-type: none"> • Whole group direct instruction on math or science

	<ul style="list-style-type: none"> • Small group and individual meetings, interventions, and enrichment • Independent guided work time on math and science components of class projects, math facts, science experiments, or math games and centers • Whole group direct instruction on phonics, vocabulary, spelling, comprehension strategies, writing skills, and/or grammar • Small group and individual meetings, interventions, and enrichment to reinforce or extend the previously named competencies
11:40—12:40	Lunch/Recess
12:45—1:15	Read Aloud Interactive read aloud focused on literacy skills and/or developing character traits
1:20—3:00	Afternoon Work Cycle* <ul style="list-style-type: none"> • Independent guided work time on literacy and history components of class projects, spelling sorts, process writing pieces, English or partner reading, or literacy centers • Art, PE, Guidance Counselor, or Music • RTI Interventions
3:05	Dismissal

A Day at Invictus Nashville—Middle

Time	Instructional Activities
8:00—8:30	Arrival Optional Before Care (breakfast, free play)
8:30—9:00	Mentoring <ul style="list-style-type: none"> • Mentor House meet classmates' activities to reinforce habits of success, social and emotional skills, and character traits.
9:05—10:15	Core Content Class (Math) <ul style="list-style-type: none"> • Students are exposed to the Illustrative Math curriculum where they will collaborate with peers, receive small group support and develop conceptual understanding of mathematical concepts that prepare students for higher order application tasks.
10:20—11:30	Core Content Class (English) <ul style="list-style-type: none"> • Students connect what they are learning to life beyond the classroom, sparking curiosity and enthusiasm for their lessons. Whether they're working on projects individually or together with peers, students learn and refine skills, such as working with a team, interpreting data, or presenting a persuasive argument. At the end of every project, students share what they've learned. They can do this through essays, presentations, lively structured debates, or other creative ways that relate to the specific project.
11:35—12:05	Lunch/Recess
12:10—1:20	Core Content Class (Science) Students learn science through discovery. Through phenomena-based, center, student-led questioning, investigating, and problem solving students are engrossed in real-world

	projects and learning.
1:25—2:35	<p style="text-align: center;">Self-Directed Learning Block/RTI</p> <p>In the Self-Directed Learning Cycle, teachers work with students to:</p> <ul style="list-style-type: none"> ● reflect on what they've learned ● set goals for what they want to learn ● plan for how they will reach their goals ● learn new facts, skills, or ideas ● show or demonstrate their learning, then reflect <p>This process promotes student development and autonomy in learning</p> <p>RTI</p> <ul style="list-style-type: none"> ● Response to Intervention (RTI) provides students with support based on their identified tiers so that they can fill gaps and thrive in school.
2:40 -3:50	<p>Core Content Class (History)</p> <ul style="list-style-type: none"> ● Students are exposed to the C3 Framework. Students will participate in content that emphasizes the acquisition and application of knowledge to prepare students for college, career, and civic life. Intentionally envisions social studies instruction as an inquiry arc of interlocking and mutually reinforcing elements that speak to the intersection of ideas and learners. The Four Dimensions highlighted below center on the use of questions to spark curiosity, guide instruction, deepen investigations, acquire rigorous content, and apply knowledge and ideas in real world settings to become active and engaged citizens in the 21st century
3:55	Dismissal

SECTION 3. AT INVICTUS NASHVILLE CHARTER SCHOOL

3.1. Behavior Expectations

Invictus Nashville Charter School has high expectations for students behaviorally and academically. Our behavior expectations are grounded in our core values:

The best behavioral intervention is a strong and engaging academic program. Behavioral issues often arise when students are unclear of expectations or procedures, or are unengaged with the content. Students are expected to demonstrate good manners and a caring, respectful attitude towards staff, students and the school environment at all times. The following sections describe our approach to fostering productive school culture at Invictus Nashville Charter School. Additional details about discipline infractions and responses may be found in our Discipline Policy.

3.2. Responsive Classroom

The Responsive Classroom approach to teaching consists of a set of well-designed practices intended to create safe, joyful, and engaging classroom and school communities. The emphasis is on helping students develop their academic, social, and emotional skills in a learning environment that is responsive to their strengths and needs.

3.2.1. Guiding Principles of Responsive Classroom

- ◆ Teaching social and emotional skills is as important as teaching academic content.
- ◆ How we teach is as important as what we teach.
- ◆ Great cognitive growth occurs through social interaction.
- ◆ How we work together as adults to create a safe, joyful, and inclusive school environment is as important as our individual contribution or competence.
- ◆ What we know and believe about our students—individually, culturally, developmentally— informs our expectations, reactions, and attitudes about those students.
- ◆ Partnering with families—knowing them and valuing their contributions—is as important as knowing the children we teach.

3.3. Mentoring

At Invictus Nashville mentors will provide support to students while they practice important learning skills. They do this by helping students deal with stress in positive ways, exploring academic options, coaching students on the Habits of Success which are social and emotional skills that enable students to be successful at both academic and non-academic pursuits. Mentors are a key part of the Invictus Nashville model because they help students learn to succeed on their own.

3.4. Bullying

Invictus Nashville Charter School takes bullying extremely seriously. Throughout each year, we work with teachers, staff, students, and parents so that they will know and understand our definition of bullying, how to deal with it appropriately, and how it is different from the developmentally typical personal conflict that all young people face.

Bullying can be physical (e.g., pushing, hitting, kicking) or verbal (e.g., yelling, teasing, insulting). It can be direct (to their face) or indirect (e.g., excluding, spreading rumors, telling lies about someone). Bullying is inappropriate, hurtful behavior that is usually deliberate, repeated, and based on a situation or perception that one person has power over another

At Invictus Nashville Charter School we work with all students to develop the skills and strategies they need to help eradicate any bullying. One of the most important skills that we want students to develop is the ability to speak up about problems they are having with others. These skills are modeled and reinforced within each mentor group during regular morning mentor meetings that develop a sense of trust and openness for discussions and lessons on bullying.

SECTION 4. SECTION 4: POLICIES AND PROCEDURES

4.1. Acceptable Use of Technology

Internet access is available to all Invictus Nashville Charter School students and staff. Access for students is for educational purposes only. Technology is integrated into the curriculum and daily lives of students to enhance learning. Students have computers available in their classrooms and often visit the computer lab for whole group lessons or special projects.

The main objectives of our technology integration program and the technology curriculum are to foster confidence and skills in the use of the computer and computer applications, to develop student's critical and creative thinking, to stimulate and foster an interest in and understanding of the use of technology for communication and research purposes, and to encourage students to work with a computer either independently or in cooperative situations

4.2. Attendance Policy

Invictus Nashville Charter School has an average daily attendance goal of at least 95% of students in attendance. Invictus Nashville Charter School is aligned with the MNPS attendance policy and we expect all students to attend school each day. We accept the following reasons for an excused absence:

- ◆ Child's illness
- ◆ Serious illness in the family
- ◆ Head lice, maximum of three days
- ◆ Death in the family
- ◆ Religious holiday

Special circumstances may be approved as excused at the discretion of school leadership who will work with families to problem-solve and prevent future absences. Examples include housing difficulties, transportation difficulties, or required family travel. When possible parents should call, email, or send a written note to the classroom teacher (elementary) or homeroom teacher (middle school) in advance detailing the reason for the absence. Parents must justify an absence in writing within five days of the absence for it to be excused by the school.

School attendance is a strong predictor of a wide range of outcomes including academic performance, reading level, and likelihood of graduating, so Invictus Nashville Charter School makes a great effort to hold students and families accountable for ensuring students are at school each day. To reduce the number of students who are chronically absent (defined as missing 10% of school days) or who are at risk of becoming chronically absent, Invictus Nashville Charter School implements a number of interventions:

Absence Threshold	Actions/Interventions
Daily absence not excused in advance	Contact guardians- call or text
3 unexcused absences	Attendance notification
5 unexcused absences	Attendance meeting between school representative and guardian. Attendance Improvement plan developed and shared with stakeholders Truancy letter sent home

7 unexcused absences	Attendance meeting between school representative and guardian. Attendance Improvement plan reviewed and updated. Truancy next steps shared with families
10 unexcused absences	Invictus is mandated by Compulsory School Attendance Law (TCA § 49-6-3001) to report a truancy concern to the Juvenile Courts. School director communicates this requirement to families.

4.3. Classroom Placement

Invictus Nashville Charter School follows the multi-grade level approach in alignment with the Montessori approach in the elementary school. The grade-bands are as follows: kindergarten (stand-alone cohorts), grades 1-3, and grades 4-5. In the middle school, students in heterogeneous classrooms at each grade level, Classroom placements are determined by the school leadership team. Families may make requests and all requests will be considered, but ultimately it is the decision of the Directors on classroom placement for students. In rare cases classroom assignments may change during the school year based on meeting the best needs of the students and the school community.

4.4. Communication

Parents must be informed of the current curriculum, major assignments, projects, upcoming classroom/school events, extension activities to further the learning process at home and other pertinent information. The following guidelines inform communication during the year:

- ◆ Mentor teachers will keep in close contact with parents by email, phone, or through notes home especially when there are areas of concern and when there is good news to share.
- ◆ Teachers have up to 48 hours during the work week to respond to parent questions or requests.
- ◆ Invictus Nashville Charter School leadership will offer special parent information sessions during the year

4.5. Confidentiality

Confidentiality is a key factor in building strong, positive relationships with our students. In order for students to feel comfortable and safe enough to talk about the delicate subjects that concern them (e.g. feelings, friendships, difficult situations at home and in school, etc.), they must trust that the teacher, counselor, administrator, or staff member that they confide in will respect their concerns by honoring their rights of confidentiality. Maintaining confidentiality, being honest, and treating students with respect are what create the relationships and bonds that allow us to have a positive impact and help our students manage difficult situations.

As professional educators, we have an ethical and legal obligation to break confidentiality as needed in order to ensure the physical and emotional safety of our students. If during the course of consultation or conversation there is any reason to suspect that the student is at risk in any way, if he or she is considering self-injury, or is a danger to others, we are required to seek additional support and report the situation to a higher official.

4.6. Dress Code

To be determined and updated by the founding leadership team.

4.7. Emergency Drills

Invictus Nashville Charter School considers the safety of students our top priority. Invictus Nashville Charter School is vigilant in its communication with all stakeholders within the school. Invictus Nashville has its exterior doors locked at all times. To enter the school, visitors must enter through a security buzzer equipped with a camera in the front office during school hours. Throughout the school year, teachers, students and staff participate in the following drills:

- **Lockout:** Is when there is a threat in the area that is not school specific but could affect the school in which no one is allowed to transition in or out of the building. In these situations, the Metro Nashville Police Department in partnership with Invictus Nashville Charter School maintains ongoing communication regarding the nature of the incident.
- **Lockdown:** This is when there is a threat of any nature that requires that all classrooms and exterior doors remain locked and no student movement within the building as the school implements its crisis response plan.
- **Shelter in Place:** This is a weather-related response in which students are kept inside the school in safe areas of the building when there is a risk of inclement weather. Students will remain in their shelter in place locations until the danger has passed.
- **Fire Drills:** Invictus Nashville Charter School is required to conduct at least one fire drill monthly. Fire drills require full evacuation from the school.
- **Tornado Drills:** Invictus Nashville Charter School is required to conduct tornado/severe storm drills twice a year. Invictus Nashville Charter School has developed procedures to minimize risks to students, staff and visitors in the event of tornadoes and severe storms.

4.8. FERPA

Invictus Nashville Charter School is required to provide annual notice of The Family Educational Rights and Privacy Act (FERPA) and the rights it provides parents and students. The FERPA gives parents, students over 18 years of age and others certain rights with respect to the student's education records. These rights are:

1. The right to inspect and review the student's education records within 45 days of the day the school receives a request for access. Parents of eligible students should submit to the school principal (or appropriate school official) a written request that identifies the record(s) they wish to inspect. The school official will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected.
2. The right to request an amendment of the student's education records that the parent or eligible student believes are inaccurate or misleading. Parents or eligible students may ask the school to amend a record that they believe is inaccurate or misleading. They should write to the school principal (or appropriate official), clearly identify the part of the record they want changed and specify why it is inaccurate or misleading. If the school decides not to amend the record as requested by the parent or eligible student, the school will notify the parent or eligible student of the decision and advise them of their right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing.

3. The right to consent to disclosures of personally identifiable information contained in the student’s education records, except to the extent that FERPA authorizes disclosure without consent. One exception, which permits disclosure without consent, is disclosure to school officials with legitimate educational interests. A school official is a person employed by the school as an administrator, supervisor, instructor or support staff member (including health or medical staff and law enforcement unit personnel); a person serving on the Invictus Nashville Charter School board of directors; a person or company with whom the school has contracted to perform a special task (such as an attorney, auditor, medical consultant or therapist); a parent or student on an official committee, such as a disciplinary or grievance committee, or assisting another school official performing his or her tasks; or an attorney from the Department of Law with a legitimate educational interest. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his/her professional responsibility. Upon request, the school can disclose education records without consent to officials of another school district in which a student seeks or intends to enroll. (Note: FERPA requires a school district to make a reasonable attempt to notify the parent or eligible student of the records request unless it states in its annual notification that it intends to forward records on request.)
4. The right to file a complaint with the U.S. Department of Education concerning alleged failures by the school to comply with the requirements of FERPA. The name and address of the office that administers FERPA are:
 - a. Family Policy Compliance Office U.S. Department of Education; 400 Maryland Avenue, SW Washington, D.C. 20202-4605

Student directory information is restricted in accordance with FERPA guidelines. If you do not want Invictus Nashville Charter School to disclose the types of information designated below as directory information from your student’s education records without your prior written consent, you must notify Invictus Nashville Charter School either in writing, or by indicating your choice on the media release form shared at the start of school.

- ◆ Student’s name
- ◆ Address
- ◆ Photograph
- ◆ Date and place of birth
- ◆ Major field of study
- ◆ Dates of attendance
- ◆ Participation in officially recognized activities and sports
- ◆ Weight and height of members of athletic teams
- ◆ Degrees, honors and awards received
- ◆ The most recent educational agency or institution attended

4.9. Harassment

Misconduct that may be perceived or described as bullying, cyber-bullying, discrimination, intimidation, or hazing may constitute prohibited harassment under this policy when the conduct (1) is based on a student’s real or perceived race, color, religion, national origin, handicap/disability, sexual orientation, ancestry, or sex, including gender identity, gender expression, and appearance; and (2) creates a hostile environment.

Harassment may take many forms and is not limited to conduct that constitutes bullying. Harassing conduct may include verbal acts and name-calling; graphic and written statements, which may include use of cell

phones or the internet; or other conduct that may be physically threatening, harmful, or humiliating if such conduct is based on a student's real or perceived race, color, religion, national origin, handicap/disability, sexual orientation, ancestry, or sex, gender identity, gender expression, and appearance. Harassment does not have to include intent to harm, be directed at a specific target, or involve repeated incidents. Harassment creates a hostile environment when the conduct is sufficiently serious (severe, pervasive, or persistent) and objectively offensive so as to deny or interfere with or limit a student's ability to participate in or benefit from the programs, services, activities, or opportunities offered by Invictus Nashville Charter School

Sexual harassment means any unwelcomed sexual advance or request for sexual favors or conduct of a sexual nature:

- ◆ When submission to such conduct is made either explicitly or implicitly a term or condition of an individual's participation in an education program or activity;
- ◆ When submission to or rejection of such conduct by an individual is used as the basis of any educational or service decision affecting the individual; and/or,
- ◆ When such conduct has the purpose or effect of substantially interfering with the student's ability to participate in or benefit from an education program or activity or creating an intimidating, hostile or offensive work or learning environment.

Sex-based harassment includes sexual harassment and non-sexual harassment based on gender identity, transgender status, gender expression or appearance, stereotypical notions of what is female/feminine v. male/masculine, or a failure to conform to those gender stereotypes.

Behaviors that constitute sexual harassment may include, but are not limited to sexually suggestive or offensive remarks; sexually suggestive pictures, sexually suggestive gesturing, verbal harassment or abuse of a sexual nature, harassing, abusive or sexually suggestive or offensive messages sent by e-mail or other electronic medium, subtle or direct propositions for sexual favors, and touching, patting, or pinching. Sexual harassment may be directed against a particular person or persons, or a group, whether of the opposite sex or the same sex.

4.10. Language

Official publications and communications, such as the school Handbook, weekly class newsletters, cafeteria menus, and extracurricular offerings are made available in English and Spanish with additional translations possible based on need. At the beginning of each school year parents indicate their preference for written and verbal communication from the school. At official school functions parents and Invictus Nashville teaching staff may choose to communicate in the language that is most comfortable for both parties.

4.11. Mandated Reporting

Under Tennessee state law, any person with reasonable cause to believe a child is being abused or neglected is a mandated reporter, meaning they must immediately report to the Tennessee Department of Children's Services or to local law enforcement. All Invictus Nashville Charter School staff members are mandated reporters, under this law. Invictus Nashville Charter School staff members are not required to discuss their suspicions with families prior to reporting the matter to the appropriate authorities, nor are they required to investigate the cause of any suspicious marks, behavior or condition prior to making a report. Under the law, mandated reporters can be held criminally responsible if they fail to report suspected abuse or neglect. As mandated reporters, staff members cannot be held liable for reports made to the Department of Children's Services which are determined to be unfounded, provided the report was made in "good faith." Causes for reporting suspected child abuse or neglect include, but are not limited to:

- ◆ Unusual bruising, marks, or cuts on the child's body

- ◆ Transporting a child without appropriate child restraints (e.g. car seats, seat belts, etc.)
- ◆ Dropping off or picking up a child while under the influence of illegal drugs or alcohol
- ◆ Leaving a child unattended for any amount of time
- ◆ Failure to attend to the special needs of a disabled child
- ◆ Children who exhibit behavior consistent with an abusive situation

If your child or family is in need of resources or support that are impacting your child's or family's well-being, please reach out to any Invictus Nashville Charter School teacher or staff member with whom you feel comfortable.

4.12. Medications and Student Illness

All medications will be kept in a locked cabinet in the office. Students should never bring medication to their classroom. Each prescription medication to be administered by school personnel must be accompanied by a signed statement from the physician/parent detailing the dosage to be administered and the time for administration. The child's doctor must fill in the section stating that the medication must be administered at school. Calls to parents or guardians to verify the information in the request may be placed by school personnel. Over-the-counter medications will not be administered by designated school personnel unless requested specifically by the parent or legal guardian. The office will provide these forms.

School personnel will distribute no medication until a completed medication form is on file. If your child has a temperature equal or above 101F, please do not bring him/her to school. If your child has or has recently had lice, they may not return to school until nits, eggs and lice are all completely gone.

If a child becomes ill during class appropriate first aid will be provided in consultation with the student's parents. A child will only be authorized to go home after parents' approval.

4.13. Non-discrimination

Invictus Nashville Charter School does not discriminate on the basis of race, religion, creed, sex, gender, gender identity, sexual orientation, national origin, color, age and/or disability in admission to, access to or operation of its programs, services or activities. Lighthouse American School does not discriminate in its hiring or employment practices.

4.14. Parent-Teacher Conferences

Formal Parent Teacher Conference will be held twice during the year, in the fall and the spring. Additional conferences may be arranged at any other time during the year by parents, teachers, and/or the Invictus Nashville Charter School director. To protect the instructional time of our students, please call or email and arrange a convenient time to meet with your child's mentor teacher. If you bring your child to school or pick them up, please do not have conferences at the door. Teachers are trying to attend to the students, and it is better to make an appointment.

4.15. Phones

Students should not use mobile phones or smart watches at any point during the school day. Students who bring devices to school must leave them turned off in a backpack while at school. Students using devices during the school day will have them confiscated to be picked up at the end of the day by a parent.

4.16. Release of Students

Teachers will not release students to unauthorized persons. If a doubt arises regarding the relationship to the student, the teacher will check the student's file for authorized names. Teachers must be alert to changes in household personnel or cases of custody and divorce, and should inform the office if these occurrences indicate a revision of names on the authorized list.

4.17. Toys and Lost & Found

Toys, games, music players, electronics, and other like items, should not be brought to school unless requested by a teacher for special purposes. Exceptions include balls or other recreational items to be used only during recess. If an item is brought without the teacher's permission, the item will be held at school until picked up by a parent. At the end of the school year, all unclaimed items will be discarded.

Misplaced toys or clothing will be taken to the Lost and Found located in the school office. If an item has been lost, families should submit a Lost Item form and the school will return the item if it has been found. At the end of each trimester, any remaining Lost and Found items will be placed in the cafeteria for families to claim. Unclaimed items will be donated or disposed of as appropriate.

4.18. Volunteers and Visitors

All faculty and staff members will wear an identification badge at all times while on campus. Volunteers and visitors for school activities are welcome, and for safety reasons must sign in at the office before going to the classroom and must wear an identification badge when in the building. Visitors must also check out in the office when they leave for the day.

ATTACHMENT C: STUDENT DISCIPLINARY POLICY

Invictus Nashville Charter School Discipline Policy
2024—2025



Invictus Nashville Charter School implements the MNPS Discipline Policy which is consistent with our relationship-based and responsive classroom approach. To foster productive school culture, we also incorporate elements of Responsive Classroom and our mentoring model as explained in our Student Handbook. Many of these policies, such as daily Mentoring Meetings, are similar to the Morning Meetings by MNPS Discipline Policy. Elements drawn from the MNPS Discipline Policy included in the Invictus Nashville Charter School Student Discipline Policy are denoted with an asterisk(*) next to the section header. Additional details and definitions may be found in the discipline handbook at www.mnps.org.

Behavior Expectations

Invictus has high expectations for students behaviorally and academically. Our behavior expectations are grounded in our core values:

- ◆ Community
- ◆ Character
- ◆ Competence
- ◆ Collaboration

The best behavioral intervention is a strong and engaging academic program. Behavioral issues often arise when students are unclear of expectations or procedures, or are unengaged with the content. Students are expected to demonstrate good manners and a caring, respectful attitude towards staff, students and the school environment at all times.

Multi-Tiered System of Support*

Behavior focuses on teaching students appropriate behaviors, as opposed to punishing inappropriate behaviors, and develops positive relationships between students and school staff. MTSS is a framework of evidence based, system-wide interventions and supports to address students' academic and behavioral needs and helps schools identify and quickly provide help to struggling students. Schools that have shared leadership support systems that engage students—rather than demand student compliance—have fewer discipline problems, increased student achievement, and higher graduation rates (Bruening, 2014).

Tips for Calming Conflict*

Show your student you understand. Listen with sincere concern to create positive relationships between your student and others. Trust then becomes the foundation for academic success and conflict resolution.

- ◆ Ask open-ended questions. For example, say “What was that like for you?” or “Tell me more about that.” This gets more than a “yes” or “no” response and helps students tell their story.
- ◆ Use reflective listening when intervening in a conflict. Get the attention of an angry person by reflecting back the feelings you hear in a nonjudgmental way. Let students tell the story—say just enough to help them.
- ◆ Help your student problem-solve disputes. Use open-ended questions and reflective listening to help him/her think about what happened. Trust that with guidance, he/she will identify a solution that works.

Skills and Strategies for Building Positive Relationships*

- ◆ Communicate understanding
- ◆ Structure tasks for success
- ◆ Reinforce behavior in a positive manner
- ◆ Set rules, limits and consequences
- ◆ Create a safe and trusting environment
- ◆ Remain neutral
- ◆ Use nonjudgmental language
- ◆ Respond only when a response is necessary
- ◆ Stay calm in tense situations
- ◆ Encourage people to “vent” while being aware of safety
- ◆ Listen and repeat what students say (reflective listening)
- ◆ Identify and label feelings, values and topics to be resolved (strategic listening)
- ◆ Ask open-ended questions
- ◆ Assist others in using a positive problem-solving process
- ◆ Create clear expectations that are consistent throughout the school

Parental Assistance*

There are times when students exhibit repeated patterns of challenging behavior. These steps can be followed to advocate for your student:

1. If you suspect your student needs additional help with his/her behavior, contact your student’s teacher, school counselor or principal in writing to request a conference to discuss your concerns
2. During this meeting, parents and teachers can discuss proactive solutions to repeated behaviors.
3. If the behaviors continue after the parent/teacher conference, the parent and/or teacher should request a Student Support Team (S-Team) meeting.
4. If the interventions are successful, the S-Team will document and may continue to monitor as needed.
5. If the behaviors continue after interventions and a disability is suspected, the appropriate assessment specialist is invited to a meeting by the S-Team.
6. If a disability is suspected at any point in this process, the school and parent should convene a meeting within 10 days to obtain written parental consent to an evaluation for special education services or a 504.

Interventions and Responses to Student Behavior

School discipline is best accomplished by preventing misbehavior before it occurs; and using positive, safe, and respectful interventions after it occurs in an effort to promote new, more adaptive skills and prevent future challenging behaviors.

Schools must balance accountability with an understanding of the origins of challenging behavior, including an understanding of the impacts of Adverse Childhood Experiences (ACEs) and toxic stress on behavior.

Training about ACEs and Trauma-Informed School Practices is recommended and readily available for all schools. Schools should incorporate a trauma-sensitive approach within a Multi-Tiered System of Supports (MTSS) that incorporates positive behavior interventions and supports (RTI2B), restorative practices, and social emotional learning foundations at the Tier 1 universal level of prevention. Essential elements of a strong Tier 1 include:

- ◆ Teaching and reinforcing school and classroom rules and expectations,
- ◆ Establishing clear and consistent consequences,
- ◆ Providing explicit expectations and training for staff on building positive relationships with students, and teaching and providing opportunities for students to engage in social emotional learning practices focused on stress reduction (e.g., regulating breaks) during the school day.

After challenging behavior warranting disciplinary action occurs, schools should draft and implement individualized student success plans (Tier 2) or behavior intervention plans (Tier 3) that explicitly include trauma-informed strategies with an emphasis on positive relationships and emotional and behavioral regulation. Examples may include pairing students with supportive adult mentors and teaching and practicing stress reduction/regulation skills to promote self-management. Trauma-informed specialists, behavior analysts (behavior support team and exceptional education coaching team), restorative practices specialists, and social-emotional learning specialists are available to assist school staff with development of individual student plans.

A restorative and consistent approach is preferable to utilizing suspension and expulsion. Suspension and expulsion are never required, except for Type 5 offenses. Length of in-school suspension (ISS) and out-of-school suspension (OSS) may not exceed the days allowed in this handbook.

Discipline Responses*

Toxic stress and traumatic events faced by students outside of the school setting can impact brain development and health, availability for learning, and behavior. In fact research shows that, in comparison to students with no known Adverse Childhood Experiences (ACEs), students with three or more ACEs are three times more likely to experience academic failure, five times more likely to have chronic absenteeism, six times more likely to have serious school disciplinary concerns, and four times more likely to exhibit somatic health complaints (e.g., headache, stomach ache).

Students and staff are expected to demonstrate mutual respect for themselves and others at all times. When students are disruptive or act inappropriately, school staff and principals are expected to respond logically, appropriately and consistently. The MNPS Discipline Table describes five types of behavior, increasing in seriousness from a Type 1 behavior to a Type 5 behavior. For example, a dress code violation is a Type 1 behavior, while bringing a firearm to school is a Type 5 behavior.

The Discipline Table also includes five levels of possible responses to inappropriate behavior (Levels A through E) and an additional potential response (Level T) for behavior on the bus. Each behavior is assigned to one or more of these levels of intervention and response. Principals and school staff may use only the levels provided for each behavior. Only one response letter may be chosen. Responses and interventions are to be progressive. If a behavior is assigned to two or more levels of response, the lowest level of intervention should be used for the first occurrence of behavior

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

- ◆ The student's age, health, disability, decision-making ability and prior intervention history
- ◆ The student's willingness to repair the harm

- ◆ The seriousness of the act
- ◆ The harm caused or the potential to cause harm, including any injuries caused
- ◆ The extent of actual disruption to the learning environment

An administrator must clearly document the reasons for using the selected response by citing the factors above in the discipline referral. In each case, MNPS administrators and staff will ensure consequences applied will minimize the amount of instructional time lost. Suspensions and expulsions are measures of last resort. An administrator is never required to expel a student unless the behavior is a Type 5 Zero Tolerance Offense.

Except for Type 5 Behaviors, students in Pre-K through Grade 4 will not be expelled. Except for Type 5 behaviors, law enforcement will not be called to make an arrest for elementary students.

“Informal” suspensions are prohibited. A parent may not be called to pick up their student for disciplinary or behavioral reasons unless the incident and the suspension are documented. Parents must be provided a copy of the student’s discipline referral when a suspension occurs.

Unless otherwise noted, all codes apply to behavior at school, on the bus, or at school-sponsored activities.

Discipline Table*

Invictus Nashville Charter School will classify and respond to behaviors using the MNPS Discipline Table. Additional details and definitions can be found in the discipline handbook at www.mnps.org.

Behavior	Code	Response Type
TYPE 1 BEHAVIORS		
Tardy to school or class	100	A
Noncompliance with reasonable request	102	A
Agitating other students	103	A
Profane or indecent language	104	A
Possession of fireworks	106	A
Dress code violation	107	A
TYPE 2 BEHAVIORS		
Repeated violations of type 1 behavior	200	A, B
Possession of tobacco products	202	A, B

Electronic devices	203	A, B
Disruption of classroom	204	A, B
Gambling	208	A, B
Drug Paraphernalia	210	A, B
Cutting Class	211	A, B
Inappropriate physical contact with other students	212	A, B
TYPE 3 BEHAVIORS		
Repeated violation of type 2 behavior	300	A, B, C
Profane language toward teacher or staff	301	A, B, C
Leaving school grounds without authorization	302	B, C
Noncompliance With an Administrative Directive or an Assigned Disciplinary Response	303	B, C
Vandalism Under \$1000	304	B, C
Theft Under \$1000	305	B,C
Falsifying school records	306	B, C
Inappropriate sexual behavior	307	B, C
Indecent Exposure	308	B, C
Offensive Touching	309	B, C
Fighting	311	B, C, D
Alcohol or Drug-Like Substance: Use or Possession, Under the Influence	312	B, C
Threats, Class 1	313	B, C
Possession of a Non-Lethal Weapon or Replica of Lethal Weapon	314	B, C
Possession of Other Weapons	317	B, C, D

Trespassing on School Grounds	318	B, C
Inappropriate Physical Contact Toward School Staff	319	B, C, D
Gang Activity: Recruitment, Display or Possession of Symbols or Paraphernalia	320	B, C, D
Use of Tobacco Products	321	B, C, D
TYPE 4 BEHAVIORS		
Harassment of School Staff	400	C, D, E
Assault of a student	401	D, E
Under the Influence of Illegal Drugs	402	C, D, E
Threats, Class 2	403	D, E
Threats by Electronic Transmission	404	D, E
Bullying	405	C, D, E
Cyberbullying	406	C, D, E
Harassment Based on Race, Color or National Origin	407	C, D, E
Harassment Based on Religion or Creed	408	C, D, E
Harassment Based on Gender, Gender-Identiy or Sexual Orientation	409	C, D, E
Harassment Based on Disability	410	C, D, E
Sexual Harassment	411	C, D, E
Assault of a Teacher or Staff	412	D, E
Extreme Disruption of the School Environment or Bus	413	C, D, E
Group Fighting	414	C, D, E
Repeated Violations of type 3 behaviors	415	C, D, E
Gang Intimidation	416	C, D, E

Off Campus Behavior: For a felony charge under T.C.A 49-6-3051(b) OR An act committed against a member of the student's school community that poses a threat to the safety of the school	417	C, D, E
Sexual Assault	418	D, E
Robbery	419	D, E
Reckless Endangerment	420	D, E
Fighting: Repeated	421	D, E
Vandalism Over \$1000	423	D, E
Theft Over \$1000	424	D, E
Refusing or Fleeing Drug or Weapon Search	425	C, D, E

Behavior Responses*

The Invictus Team will make every effort to avoid behavior problems through proactive Responsive Classroom procedures and modeling of expected academic and social behaviors. In instances where reminding or redirecting language does not result in noticeable change, LAS teachers will utilize the logical consequences that result from student behavior and implement interventions to prevent future disruptions of coexistence within the school community. Below are possible responses to the behaviors found in the previous chart.

LEVEL A: TEACHER, STUDENT, PARENT, SCHOOL STAFF

1. All relevant stakeholders (the teacher, student(s), or any other adult) involved in the behavior incident share their perspective on what happened and how they were impacted. The intent is to achieve resolution through mutual understanding and respect. Classroom expectations should be discussed and reiterated at this time.
2. The teacher will check-in with the student periodically to ensure the relationship has been restored and to encourage continual relationship building
3. Parent(s) should be notified to:
 - a. Alert them of the infraction
 - b. Get parental perspective on solutions (parent voice)
 - c. Share the outcome of the restorative intervention
 - d. To encourage at home support for the identified classroom expectation
 - e. To discuss, if necessary, the need for additional support for the student (ex: social worker, S-Team, 504 Team, restorative assistant, counselor, psychologist or cluster

support team). Additional supports may also be needed to support the classroom environment and/or teacher

4. Interventions will be documented.

LEVEL B: ADMINISTRATIVE REFERRAL

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

LEVEL C: SUSPENSION OPTION

1. Steps one through five are repeated from Level B.
2. If necessary, administrator may: a. Give middle school and high school students ISS or comparable services for one to three days OR one to three days of out-of-school suspensions (OSS), not to exceed a total of three days. b. Give elementary students one to two days of ISS OR, after obtaining supervisory approval, one to two days of OSS, not to exceed a total of two days.
3. A formal restorative conference must occur upon return from suspension with all necessary parties to modify the student's plan of support. Parents/guardians, student, teacher(s), relevant support staff and community support must be invited.

LEVEL D: SUSPENSION OPTION

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

3. When choosing a higher-level response within the range of possible responses, an administrator must consider:
 - a. The student's age, health, disability, decision-making ability and prior intervention history.
 - b. The student's willingness to repair the harm.
 - c. The seriousness of the act.
 - d. The harm caused or the potential to cause harm, including any injuries caused.
 - e. The extent of actual disruption to the learning environment.
4. Upon return from suspension, a restorative conference must occur and a collaborative referral must be made. A plan of support for the student must be created.

LEVEL E: EXPULSION OPTION

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

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

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

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

Disciplinary Due Process for Suspensions and Expulsions*

Invictus Nashville Charter School shall maintain compliance with LEA policies and procedures for due process when a student is suspended or expelled as a result of a student discipline policy/code of conduct violation.

ATTACHMENT D: ENROLLMENT POLICY

INVICTUS NASHVILLE CHARTER SCHOOL ENROLLMENT POLICY

Background

Invictus Nashville Charter School (INCS) is an open enrollment charter school located in Nashville, TN. We will serve grades K–8. Pending the approval of The Metropolitan Nashville Board of Public Education, Invictus Nashville Charter School will open in August of 2024 beginning with grades K-1 and adding one grade each year thereafter.

As a school of choice, Invictus Nashville is committed to providing a fair and transparent process for prospective students to apply and enroll. The following document outlines the policies and procedures that Invictus Nashville and its representatives will employ to administer the annual student enrollment cycle.

Eligibility

Per TN § 49-13-106, “Public charter schools authorized by an LEA may be formed to provide quality educational options for all students residing within the jurisdiction of the chartering authority; provided, however, an LEA may authorize charters to enroll students residing outside the LEA in which the public charter school is located pursuant to the LEA out-of-district enrollment policy and in compliance with § 49-6-3003 and § 49-6-403(f).”

To be eligible to attend Invictus Nashville , a student must:

1. Be of appropriate age and/or meet the promotion requirements for a given grade level
2. Have full-time, legal residence in Davidson County

In order to prove a student meets residency requirements, Invictus Nashville may ask the student’s legal parent/guardian to provide additional documentation at the time of enrollment or registration.

Acceptable forms of residency documentation include:

- ♦ An original lease, mortgage statement, or deed
- ♦ Official payroll documentation (e.g. paystub) from an employer (issued within the last 60 days)
- ♦ A residential utility bill in the resident’s name (issued within the last 60 days)
- ♦ Documentation from a federal, state, or local government agency (issued within the last 60 days)
- ♦ An original lease, mortgage statement, or deed
- ♦ A current property tax or homeowner’s/renter’s insurance bill

The Invictus Nashville Enrollment Policy prohibits discrimination on the basis of race, color, religion, national origin, handicap/disability, sexual orientation, ancestry, need for special education services, or sex, including gender identity, gender expression, and appearance. Invictus Nashville admissions practices will comply with federal, state, and local laws and policies.

Homeless students

The McKinney-Vento Homeless Education Assistance Act defines “homeless children and youth” as individuals who lack a fixed, regular, and adequate nighttime residence, including children and youth who are:

- ♦ Sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason;

- ◆ Living in motels, hotels, trailer parks, camping grounds, cars, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings due to the lack of alternative adequate accommodations;
- ◆ Living in emergency or transitional shelters;
- ◆ Abandoned in hospitals;
- ◆ Awaiting foster care placement;
- ◆ Migratory children who qualify as homeless because they are living in circumstances described above; or
- ◆ Unaccompanied youth, including youth not in the physical custody of a parent or guardian, such as runaways and youth denied housing by their families.

Homeless youth are afforded several important rights:

1. The right to immediate enrollment in school, even if lacking paperwork normally required for enrollment;
2. The right to attend school in his/her school of origin (if this is requested by the parent and is feasible) or in the school in the attendance area where the family or youth is currently residing;
3. The right to receive transportation to his/her school of origin, if this is requested by the parent;
4. The right to services comparable to those received by housed schoolmates, including transportation and supplemental education services;
5. The right to attend school along with children not experiencing homelessness.
6. Segregation based on a student's status as homeless is strictly prohibited.

Invictus Nashville will screen for homelessness as part of the enrollment and registration process and will keep in mind the possibility that a family may qualify as homeless, and thus have the enrollment rights stated above, when asking for additional documentation or proof of residency.

Custody/guardianship

A parent/guardian must have legal custody or guardianship of a student to claim his or her residence as proof of enrollment eligibility. The residence of someone who is not the child's legal guardian cannot be claimed for eligibility purposes, even if a child stays at that residence. In circumstances of joint custody, either guardian's residence can serve as proof of enrollment eligibility.

Shared residency

Parents/guardians of students may reside temporarily or permanently with a family member or other individual. In those circumstances, the parent/guardian will not be able to provide adequate proof of residency documents associated with his/her name. Accordingly, the parent/guardian and the primary resident of the home/apartment will be asked to complete a Shared Residence Affidavit.

Lottery

At the end of the application period, Invictus Nashville staff will count all the applications postmarked, both physically and electronically, by 11:59 on the day of the deadline. In the event that Invictus Nashville receives more student applications than available seats in a given grade level, offers of enrollment shall be determined through a public, random lottery. A third party will run the lottery and an independent

accountant/attorney shall inspect the results and certify that the lottery was conducted in accordance with stated enrollment policies.

Priority groups

Per TN § 49-13-113(c), Invictus Nashville may afford enrollment preference to certain groups of students. Invictus Nashville defines its enrollment priority groups, in order of preference, as follows:

Group Name	Description
Children of Invictus Nashville employees & board members	<ul style="list-style-type: none"> Not to exceed 10% of total school enrollment or 25 students, whichever is less Subject to the definition of "children" included below
Siblings	<ul style="list-style-type: none"> Applies to students who have a sibling currently enrolled at Invictus Nashville Subject to the definition of "sibling" included below <p>Note: Siblings who participate in the same lottery for the same grade (e.g. twins) shall be considered as a group. Provided capacity permits, if one sibling is chosen in the lottery, then all other siblings will automatically be offered enrollment as well.</p>
All other students	Any other eligible student who does not fall into one of the categories identified above

Relevant Definitions

Children: Sons or daughters of an employee or board members. Grandchildren, nieces, and nephews do not receive the children of employees and board members enrollment preference.

Sibling: Children who share a common biological or legal guardian as opposed to children who live in the same household but do not share a common parent. Invictus Nashville reserves the right to require proof of sibling status.

Lottery process

MNPS requires that Invictus Nashville employ its Student Assignment System (SAS) software for its enrollment lottery. The SAS system processes student records in the following manner:

- The system sorts students, by grade level, into their associated priority groups
- After all students have been placed into a priority group, the system then randomizes the ranking of students within each group
- Students in a given grade level are then processed, one by one, in order of their priority group and ranking within that priority group.
- If an opening exists, the student will receive an enrollment offer.
- The system then repeats these steps for the next priority group and grade level.

Waitlist

Openings may not exist for all students processed during the lottery. If an opening does not exist at the time that the student's record is processed, the student will automatically be waitlisted. The order that a student is randomly processed in the lottery determines the order of that student on the waitlist. Applications received after the deadline will be added to the end of the waitlist. Late applications will be placed in the order in which they were received starting with the position immediately after the last student application processed in the lottery.

Enrollment procedure

Invictus Nashville will formally notify all families in attendance of the lottery outcome on the evening of the event. Invictus Nashville will also notify families via phone, email, and mail on the day after the lottery event. To secure their student's seat, families must notify Invictus Nashville in writing of intent to enroll by March 20th

- ◆ Acceptable forms of written notification include:
- ◆ Intent to enroll form (in-person, mailed, scanned/emailed)
- ◆ Intent to enroll web-form

In the event that some families decline an offer of enrollment, Invictus Nashville will begin processing waitlisted students as soon as seats become available. The families of waitlisted students will be notified via a combination of email, home visits, and telephone and will have 48 hours to verbally notify Invictus Nashville of intent to enroll. Waitlisted families will have a week from the initial date of the enrollment offer to notify Invictus Nashville in writing.

If the number of applications does not meet or exceed the number of seats available by the close of the application period, all applicants will be accepted into the school, and additional seats will be filled on a first come, first-serve basis. Upon admission to the school, all families must complete an admissions packet that will include home language survey, enrollment forms, immunization records, transportation needs and preferences, and medical history documents. Admissions packets will be mailed within one week of accepting a seat at Invictus Nashville, and families will have one week to submit an admissions packet for final admission. Families may extend completion of admissions packet and reserve seat, as needed, if they call the school or submit a written letter of confirmation.

Timeline

Invictus Nashville will adhere to the following timeline for its 2022 student enrollment cycle (dates subject to change based on application calendar established by MNPS):

Milestone	Date	Description
Application Opens	September 2023	The application will launch on the Invictus Nashville website.
Applications Due	February 2024	Applications must be postmarked (mail) or sent (electronically).
Final Capacity & Determinations	No more than 1 week after the application closes.	Invictus Nashville will finalize the number of seats available and students who will be offered enrollment.

Lottery (if necessary)	March 2024	Results will be announced to families and all families will be notified by email and mail. The results will be conducted in advance under legal supervision.
Intent to enroll decision	March 2024	Selected families from the lottery must notify Invictus Nashville in writing of intent to enroll.

Firm dates, once established/confirmed, will be advertised to the public and posted on the Invictus Nashville website.

Mid-year transfers and withdrawal

Families who elect to withdraw their student from Invictus Nashville or transfer to another school mid-year will be required to sign the MNPS withdrawal form acknowledging that they are forfeiting their seat at Invictus Nashville and may not be able to apply again until the following academic year.

ATTACHMENT E: LETTERS OF SUPPORT



To Metro Nashville Public Schools

Subject: Letter of support for charter application of Dr. Brenda Jones

I am writing to express my personal support for the application of Dr. Brenda Jones to launch a school featuring the method of Dr. Maria Montessori for early childhood and elementary students .

The Montessori model should have a growing place in the portfolio of a dynamic, diverse and growing city like Nashville. Rigorous academic studies show that the Montessori method can close academic opportunity gaps for low-income children (see Angeline Lillard, 2017). And we now have Tennessee based evidence as well. Libertas was the first Montessori charter school in our state in 2015, and since then successfully turned around a low-performing neighborhood school as part of the Achievement School District. By 2021 we were the highest achieving charter school in Memphis. Montessori's developmentally-responsive, individualized, and multi-sensory approach is highly suitable to serving a range of early childhood disabilities; our school has the largest concentration of special needs of any charter school, and these students achieved in the top 15% of their subgroup in the state last year. And in 2022 we earned our third straight TVAAS Level 5 - the highest designation for academic growth.

Dr. Jones and her team are a promising organization to implement public Montessori education. She already has an impressive track record as an educational leader. Furthermore, as part of her incubation program, she completed a Residency at Libertas last year, where she had a chance to see up close the ways we fully implement Montessori and supplement it with data-driven instruction and professional development practices. She has remained in close touch with me in the months since then, discussing best practices, and other schools to visit around the nation.

We are also in conversation with Dr. Jones about a closer partnership to help her ensure effective implementation of this proposed charter through our Arete Memphis Public Montessori Residency. Libertas founded and hosts Arete, the nation's first dual-certification - nationally-accredited diploma (Montessori Accreditation Council for Teacher Education) and Tennessee state teaching license - Montessori Educator Preparation Program focused on expanding the size and diversity of the teacher pipeline for urban public schools. Our hybrid program trained 24 teachers and over 40 education assistants for three schools across the Grand Divisions of Tennessee in 2021-22. This program includes over 250 hours of intensive, hands-on classroom training combined with observation and coaching in the field, and will help ensure quality instruction.

I support Dr. Jones' plan and urge you to partner with her to offer this rich, rigorous, and personalized pathway for learning for more children in your community. Please don't hesitate to contact me with any questions.

Sincerely,

A handwritten signature in blue ink that reads "Bob Nardo".

Bob Nardo
Executive Director
Libertas School of Memphis

city fund

May 19, 2023

Metro Nashville Public Schools
2601 Bransford Avenue
Nashville, TN 37204

Dear MNPS School Board:

I am writing to inform you that on Sep 29, 2021, the City Fund board of directors approved a \$3.8M budget to support public education efforts in Nashville. A portion of that budget is allocated towards supporting the creation of high-performing public charter schools, and we are prepared to support Invictus' start-up costs upon its authorization.

We are confident in the financial and leadership capacity of the Invictus founding team to launch a high quality charter school in the Donelson community, and we respectfully encourage you to authorize the school.

Invictus' investment and leadership in the community to date is a testament to the founding team's commitment to the students and families in Nashville.

Sincerely,



Chris Barbic
Partner, City Fund



January 18, 2023

Metro Nashville Nashville Public Schools :

I support the charter application for Invictus Nashville Charter School, and Lead Founder, Dr. Brenda Jones.

Brenda is currently a Fellow with BES, a highly selective, nationally recognized non-profit that trains high-capacity leaders to design, found, lead, and sustain high-performing urban charter schools. I have had the opportunity to work closely with her through the Fellowship and have observed first-hand the commitment to her region and the many assets she brings to this work. Brenda is a dedicated leader who brings diverse skills and experiences in school/district leadership, leadership coaching, teaching, adult learning, and professional development.

Brenda has spent over a decade in the field of education, beginning as a teacher and lead data specialist in Nashville. Her experience spans a variety of schools and educational companies, with a high emphasis on her commitment to educational leadership. Most recently, Brenda served as School Success Manager for Gradient Learning. There, she managed a portfolio of schools and coached leaders toward improving student outcomes.

Brenda possesses a clear and coherent vision for a rigorous, Montessori, and project-based learning instructional approach and a school environment that affirms the voices and identities of all students. She has developed a deep desire to impact the educational landscape of Nashville and surrounding communities. This is evident in her deep connections to the city and the implementation of community feedback in her school design. She has consistently engaged the community and stakeholders in the design process to ensure stakeholders help craft a school to meet the community's unique needs. It is a privilege to work closely with Brenda, and I have confidence that her leadership and the intentionality behind her school model will ensure that Invictus Nashville Charter School is a high-achieving school.

With great pleasure, I support the Invictus Nashville Charter School and Lead Founder, Dr. Brenda Jones.

Best regards,



Dr. Chaundria Smith
Senior Director of Leadership Development, BES
csmith@bes.org 617-227-4545 x203



January 16, 2023

To Whom It May Concern,

I am writing to express Level Field Partners' ("Level Field" or "LFP") support for Dr. Brenda Jones and Invictus Nashville's charter application.

Level Field's mission is to enable cost-effective access to first-class facilities for high quality public charter schools. Our team has more than 80 years of experience helping charter schools address some of their most pressing real estate and related financing challenges in order to educate more children, enrich learning environments, and strengthen their economic standing. The team has deep internal sector knowledge from having served as charter school financial and operations leaders, in-house real estate developers, and general counsels. We are proud that our structure allows us to combine sophisticated commercial expertise with a mission-driven approach guided only by what's best for the schools we serve.

Our unique approach, depth of expertise, and strong national partnerships have enabled us to work on behalf of leading charter school organizations in 29 states, which includes projects in Tennessee. Collectively, the Level Field team has financed and developed 120+ charter school projects representing more than 4.2MM square feet of educational space and totaling more than \$1.1B+ in project costs.

Through our national partnerships, we are proud to support Invictus Nashville's founder, senior leadership team, and Board of Directors in the following ways:

- Supporting and leading the site search and feasibility assessment of prospective locations in Nashville (inclusive of temporary and permanent campuses)
- Reviewing and refining key facility inputs into multi-year financial models
- Identifying potential financing sources and engaging in initial outreach efforts
- Leading the assemblage of key project team members to refine project schedule and project scope, inclusive of test fits
- Supporting acquisition negotiations on prospective facility options with Invictus' legal counsel and leadership team to result in a clear acquisition timeline

Thank you for the opportunity to express our support for Dr. Jones and Invictus Nashville. Please reach out should you have any questions.

With best regards,

A handwritten signature in blue ink that reads "Cristine Doran". The signature is written in a cursive, flowing style.

Cristine Doran
Vice President
Level Field Partners



January 18, 2023

RE: Invictus Nashville Charter School

To Whom It May Concern:

I understand that one of our Board members has been meeting with Dr. Brenda Jones about the possibility of leasing one of our sites to Invictus Charter School.

I also understand that this Charter School is likely a couple of years off.

We will be glad to work with Dr. Jones and her Board to try to locate her school in one of our available properties at the time.

Sincerely,

A handwritten signature in blue ink, appearing to read "Jimmy Granbery".

Jimmy Granbery
Chair and CEO



**FOR YOUTH DEVELOPMENT®
FOR HEALTHY LIVING
FOR SOCIAL RESPONSIBILITY**

To Whom It May Concern:

I have the pleasure of writing a letter of recommendation on behalf of Invictus Nashville Charter. Our community needs more places where the youth can grow and learn in a safe and encouraging atmosphere. The staff from Invictus that I have had the opportunity to interact with have displayed a true passion for building up the youth in our community and providing them with an alternative means to acquire their education. Their eagerness to partner with other local organizations, and build relationships is another reason I believe our community would benefit if Invictus were to be approved to open their school.

I serve as the regional sports director for the YMCA of Middle Tennessee. Our focus is primarily on youth sports and providing opportunities for the children in our communities to live a healthy active lifestyle. We often partner with area schools to raise awareness for our programs, and occasionally share facilities. To bring a new school to the community who has shown a willingness to work together and grow these opportunities would be a true blessing. We have already had several opportunities to work with the staff from Invictus, and their interactions with the youth in our programs have shown how much of an impact they will be able to provide to the community.

I have the utmost confidence that Invictus would be a very beneficial addition to our community. I look forward to one day soon see children enrolled at Invictus signing up for our programs with the YMCA. Please feel free to contact me at 615-889-2632, or by email at mgreen@ymcamidtn.org, if I can provide any additional information.

Sincerely,

Matt Green
Regional Sports Director
YMCA of Middle Tennessee



January 12, 2023

Metro Nashville Public Schools
2601 Bransford Avenue
Nashville, TN 37204

Dear Metro Nashville Public Schools,

I am pleased to write this letter in full support of Invictus Nashville Charter School. I am a firm supporter of school choice for all members of the Nashville community and believe Invictus Nashville will fill a great need in the Hermitage area. A district the size of MNPS requires a wide variety of educational options for its children and Invictus Nashville's Montessori focus will broaden the District's reach beyond the current limited public Montessori options.

Salama Urban Ministries has been committed to providing high quality, out of school time options for primarily low and moderate income families for 37 years. Our programming is designed to support the educational outcomes MNPS strives to attain with students. We are pleased to have mutually beneficial, reciprocal relationships with partner schools and believe in the work they do. Still, we have many families who are sometimes challenged with the choices they currently have to meet their children's needs. I believe Invictus Nashville will be another important educational option for Nashville families and will help to improve educational outcomes for MNPS students.

We wholeheartedly support Invictus Nashville Charter School and will do so through a variety of means. We stand ready to assist with parent and student recruitment, community outreach, exploration of out of school time supports for students, and Board leadership and engagement.

We support Dr. Brenda Jones' passion, vision, and leadership and are confident Invictus Nashville will be an excellent addition to the educational landscape in Nashville. As such, Invictus Nashville has my full support and recommendation.

Sincerely,

Dawana L. Wade, CEO
Salama Urban Ministries, Inc.
Nashville, TN



WELCH
—COLLEGE—

William Slater, M.Ed., J.D.
Dean of Adult Studies, M.A.T. Faculty
1045 Bison Trail
Gallatin, TN 37066
wslater@welch.edu · 615-289-3017

March 25, 2022

Metro Nashville Board of Education
2601 Bransford Avenue
Nashville, TN 37204

Dear Members of the Metro Nashville Board of Education,

I am writing to express my support for Invictus Nashville Charter School. With over twenty-five years of experience in education in middle Tennessee, I believe Invictus Nashville Charter School will be an asset to the Nashville community. Invictus Nashville Charter School will provide an educational choice to families, one with culturally relevant curriculum, community service, mentoring, and exploratory learning. Graduates will be equipped with the necessary habits of success and a heart for service in their communities.

I am confident that Invictus Nashville Charter School's Leadership Team has the necessary credentials and experience to provide an exceptional educational choice for K-12 students in our community.

I support the approval of Invictus Nashville Charter School to serve students in the Metro Nashville Public School district. I value the mission and approach of Invictus Nashville Charter School and I would be pleased to see a school of choice in the community.

Sincerely,

William H. Slater

Metro Nashville Public Schools
2601 Bransford Avenue
Nashville, TN 37204

Dear Metro Nashville School Board members,

I am writing to express my full enthusiastic support for Invictus Academy, a proposed public charter school. As a community psychologist and professor of human development, I believe parents in the McGavock cluster deserve a choice in selecting school placement for their families. The challenging and developmentally oriented curriculum offered by Invictus would be an asset to these students, their families, and their community.

I have known Dr. Brenda Jones for over 20 years and have worked with her in various school and community capacities. She has always been dedicated to Metro Nashville Public Schools. As a student Dr. Jones was a bright star in MNPS, excelling from her days at Kirkpatrick Elementary through her graduation from Hillsboro High School. As an educator, she has continued to support MNPS through creative teaching and thoughtful administration. As you know all too well, when the pandemic hit, many educators left the field altogether. Dr. Jones, on the other hand, doubled down on her efforts to support students, offering a tutorial service to partner with families who needed help to navigate remote learning. Providing this much needed service required Dr. Jones to raise her own funds and recruit, hire, and train her own team, all during an unexpected global health emergency. Her ability to see a problem and enthusiastically take it on as a challenge is unmatched.

As a retired university professor of psychology and human development, I am excited to put the full weight of my energy and experience behind Invictus. Dr. Jones' vision for the school community centers parent and family voices in setting goals for the school and providing leadership. I look forward to sharing my professional experience as an educator of group dynamics and organizational consulting to support Dr. Jones in this endeavor. I am also committed to utilizing my skills in program evaluation and data analysis to help Dr. Jones and Invictus parent leadership build a plan for continually assessing their progress over time.

Thank you for your consideration of Invictus to offer school choice to parents in the McGavock cluster. I look forward to the ways Dr. Jones can continue to be of service to MNPS families and enthusiastically recommend the approval of Invictus.

Sincerely,

Allison McGuire, Ph.D.
Nashville, TN



GO, LADIES! PODCAST

Metro Nashville Public Schools
2601 Bransford Avenue
Nashville, TN 37204

To The Metro Nashville Public School Board,

I am honored to write this letter in support of Invictus Nashville Charter School. This school's mission is to prepare K-8 students to become engaged members of society by helping them identify their unique path to personal and professional success. Invictus Nashville is committed to excellence in education through cultivating a diverse culture, a personalized learning environment and a commitment to community service. To put it plainly, Invictus Nashville is the exact type of school option parents need to partner with in raising smart, strong, civic-minded adults.


As a Nashville resident and parent, I have had the privilege of seeing the community's growth and expansion. In my previous roles as journalist for WTVF-NewsChannel5 and as Director of Communication for the Tennessee Department of Correction, I've seen first hand the painful consequences of an undereducated community. I firmly believe that Invictus Nashville will be a school that not only meets but exceeds the community's needs.

As a charter board member, I am committed to lending my support to this school in a multitude of ways. My experience in media and communications will be an asset in generating community support, parent recruitment and outreach. I stand ready to assist the administration in any way possible to bring this school to the area.

Sincerely,

Neysa Taylor
Host - Go, Ladies! Podcast

615-283-0701
Nashville, TN
goladiespodcast.com



Cassandra Lemon
Founder and Owner of Let's Jam, LLC
1723 A 23rd Ave North Nashville, TN 37208
cassandra.d.lemon@gmail.com

06/19/2022

Metro Nashville Board of Education
2601 Bransford Avenue
Nashville, TN 37204

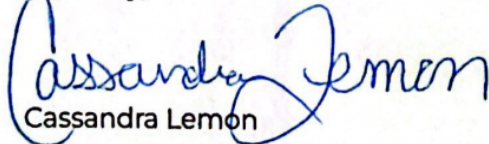
Dear Members of the Metro Nashville Board of Education,

I am writing to express my support for Invictus Nashville Charter School. As a previous employee of Metro Nashville Public Schools, I believe Invictus Nashville Charter School will be an asset to the Nashville community. After working with two charter networks in the Nashville community, I believe the intentionality of collecting community voices that Invictus Nashville Charter is prioritizing in their design framework makes their school different from others. What drew me to support this school was their focus on collecting community perspective before designing their school. I believe the school will provide families access to culturally relevant pedagogy, community service, mentoring, and exploratory learning.

I am confident that Invictus Nashville Charter School's Leadership Team has the necessary experience, expertise, credentials, and flexibility to provide an exceptional educational option for K-12 students in our district.

I support the approval of Invictus Nashville Charter School to serve students in our district. I value the mission and approach of Invictus Nashville Charter School and I would be pleased to see a school of choice in the community.

Sincerely,


Cassandra Lemon



Travis Joshua Stone
Executive Director of the Mental Health Active Response Team
5324 Old Village Rd, Nashville, TN 37211
Tjstone1984@gmail.com

3-24-22

Metro Nashville Board of Education
2601 Bransford Avenue
Nashville, TN 37204

Dear Members of the Metro Nashville Board of Education,

I am writing to express my support for Invictus Nashville Charter School. I am a resident of Metro Nashville Public School District, and I believe Invictus Nashville Charter School will be an asset to the Nashville community. Invictus Nashville Charter School will provide an educational choice to families, one with culturally relevant curriculum, community service, mentoring, and exploratory learning. Graduates will be equipped with the necessary habits of success and a heart for service in their communities.

I am confident that Invictus Nashville Charter School's Leadership Team has the necessary credentials and experience to provide an exceptional educational choice for K-12 students in my district.

I support the approval of Invictus Nashville Charter School to serve students in my district. I value the mission and approach of Invictus Nashville Charter School and I would be pleased to see a school of choice in the community.

Sincerely,

Travis Joshua Stone

MHART

762 E Argyle Ave
Nashville, TN 37203

info@mharttn.org
<http://www.mharttn.org>

Board of Education
Metropolitan Nashville Public Schools
2601 Bransford Avenue
Nashville, TN 37204

Dear Metropolitan Nashville Board of Education,

I am writing to express my support for Invictus Nashville Charter School, its innovative approach to education, and its dedicated founder, Dr. Brenda Jones. The Montessori-inspired approach in elementary school, project-based learning emphasis in middle school, and focus on whole-child development through mentoring, community service, and expeditionary learning will make Invictus a distinctive asset for our city and its youngest residents.

I am particularly impressed with Dr. Jones, a Nashville native and proud graduate of MNPS, as well as three institutions of higher education in the local area. She has personally committed her life to uplifting youth in our city and her dedication to providing an innovative, student-centered education is evident in her past and will be evident in the future success of Invictus. I believe families will be inspired by her story and her life of service and seek to have their students benefit from proximity to her.

Furthermore, Invictus is particularly important for the Donelson community from the point of view of academic opportunity. In 2021, data show that only 10% of students scored "on track" or "mastered" in math state testing and 15% of students for ELA, and 42% of students are experiencing the challenges of being economically disadvantaged. Invictus will provide a valuable alternative that addresses the community's academic needs - and the challenges of poverty that create them.

I urge you to support Invictus Nashville Charter School, Dr. Brenda Jones, and her mission to provide an innovative, student-centered education to the students of the Donelson community.

Sincerely,
Ben Schumacher
Former Executive Director of Teach For America Nashville-Chattanooga

Melinda Coston-Skyers
5130 Mountainbrook Circle, Hermitage, TN 37076
macoston@gmail.com

April 20, 2022

Metro Nashville Board of Education
2601 Bransford Avenue
Nashville, TN 37204

Dear Members of the Metro Nashville Board of Education,

I am writing to express my support for Invictus Nashville Charter School. I am a resident of School Board District 4 and I believe Invictus Nashville Charter School will be an asset to the Nashville community. Invictus Nashville Charter School will provide an educational choice to families, one with culturally relevant curriculum, community service, mentoring, and exploratory learning. Graduates will practice the necessary habits of success and do service in their communities.

I am confident that Invictus Nashville Charter School's Leadership Team has the necessary credentials and experience to provide an exceptional educational choice for K-12 students in my district.

I support the approval of Invictus Nashville Charter School to serve students in my district. I value the mission and approach of Invictus Nashville Charter School and I would be pleased to see a school of choice in the community.

Sincerely,



Melinda Coston-Skyers

The Courtney Teasley Law Firm

615 Main Street, Suite M22
Nashville, TN 37206
www.cteasleylaw.com

Courtney Teasley
Attorney
Courtney@CTeasleylaw.com

Licensed in TN
Phone:(615) 521-1178
Facsimile: (615) 301-5804

January 7, 2023

Metro Nashville Public Schools
2601 Bransford Ave
Nashville, TN 37204

RE: Courtney Teasley's Letter of Support for Invictus Charter

To Whom It May Concern:


I am in support of Invictus Nashville Charter School. As a Metro Nashville Public School (MNPS) grad, there are many deficiencies in the learning we received. Children from marginalized communities need to know, learn and have access to a more thorough education including subjects and social issues that disproportionately affect them such as finances, entrepreneurial skills, change making and their constitutional rights. I am in support of Invictus Nashville Charter School's mission for this very reason.

I am a MNPS grad, former mock trial coach for Stratford STEM Magnet, 2018 MNPS Partner of the Year, former criminal justice adjunct professor at TN State University, criminal defense attorney for the past 10 years, Nashville history making judicial campaign manager and I am now opening a social enterprise with a mission to provide proactive strategies and solutions for the disproportionately affected by the criminal justice system of oppression. Invictus aligns with my personal life mission to disrupt and dismantle systems of oppression by beginning with reforming the education for the least of us, the children.

I plan to support by generating community support, parent recruitment and outreach as well as providing training and resources to assist educators when teaching students about their constitutional rights and the importance of such, especially for students of color since they are three to five times as likely to be incarcerated than their white counterparts.

If you have any questions or concerns, please do not hesitate to contact me at the above listed information.

With kindest regards,


Courtney Teasley

Alexandria Coston
370 Wallace Road Unit F-11, Nashville, TN 37211
alexandriacoston@gmail.com

April 20, 2022

Metro Nashville Board of Education
2601 Bransford Avenue
Nashville, TN 37204

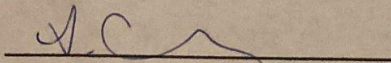
Dear Members of the Metro Nashville Board of Education,

I am writing to express my support for Invictus Nashville Charter School. I am a resident of School Board District 7 and I believe Invictus Nashville Charter School will be an asset to the Nashville community. Invictus Nashville Charter School will provide an educational choice to families, one with culturally relevant curriculum, community service, mentoring, and exploratory learning. Graduates will be equipped with the necessary habits of success and a heart for service in their communities.

I am confident that Invictus Nashville Charter School's Leadership Team has the necessary credentials and experience to provide an exceptional educational choice for K-12 students in my district.

I support the approval of Invictus Nashville Charter School to serve students in my district. I value the mission and approach of Invictus Nashville Charter School and I would be pleased to see a school of choice in the community.

Sincerely,



Alexandria Coston

LETTER OF SUPPORT. 1.12 PARENT AND COMMUNITY ENGAGEMENT SUPPORT

Invictus Petition of Support Snapshot

Petition of Support for the addition of Invictus Nashville Charter School as an option in the public education landscape in Metro Nashville Public Schools. Thanks for your support of our school community. Invictus Nashville Charter School will be a tuition-free, public charter that intends to open in the Fall of 2024.

By completing this form, I am expressing my support for this school to open in the Metro Nashville region. I understand that the school location has not been finalized yet. I also understand that my support for the school at this moment does not reflect my support for the school in the future. By submitting this form, I give Invictus Nashville permission to count me as a "supporter" in their charter application. By submitting this form, I also give Invictus Nashville Charter school permission to contact me in the future about additional ways to express my support of the school.

Gracias por su apoyo a nuestra comunidad escolar. Invictus Nashville Charter School será una escuela autónoma pública y gratuita que tiene la intención de abrir en el otoño de 2024. Al completar este formulario, expreso mi apoyo a la apertura de esta escuela en la región metropolitana de Nashville. Entiendo que la ubicación de la escuela aún no se ha finalizado. También entiendo que mi apoyo a la escuela en este momento no refleja mi apoyo a la escuela en el futuro.

Al enviar este formulario, doy permiso a Invictus Nashville para contarme como "partidario" en su solicitud de estatuto. Al enviar este formulario, también doy permiso a la escuela chárter Invictus Nashville para que se comuniquen conmigo en el futuro sobre formas adicionales de expresar mi apoyo a la escuela.

Signatures

(Names redacted for privacy)

Category	Number of Signatures
Age Eligible Families	47
Non-eligible MNPS Families	50
Davidson County Residents	82
Total Signatures	179

Petition of Support for the addition of Invictus Nashville Charter School as an option in the public education landscape in Metro Nashville Public Schools. Thanks for your support of our school community. Invictus Nashville Charter School will be a tuition-free, public charter that intends to open in the Fall of 2024.

By completing this form, I am expressing my support for this school to open in the Metro Nashville region. I understand that the school location has not been finalized yet. I also understand that my support for the school at this moment does not reflect my support for the school in the future. By submitting this form, I give Invictus Nashville permission to count me as a "supporter" in their charter application. By submitting this form, I also give Invictus Nashville Charter school permission to contact me in the future about additional ways to express my support of the school.

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Al enviar este formulario, doy permiso a Invictus Nashville para contarme como "partidario" en su solicitud de estatuto. Al enviar este formulario, también doy permiso a la escuela chárter Invictus Nashville para que se comuniquen conmigo en el futuro sobre formas adicionales de expresar mi apoyo a la escuela.

Signatures

(names redacted for privacy)

Category	Number of Signatures
Age Eligible Families	47
Non-eligible MNPS Families	50
Davidson County Residents	82
Total Signatures	179

EVIDENCE OF COMMUNITY ENGAGEMENT

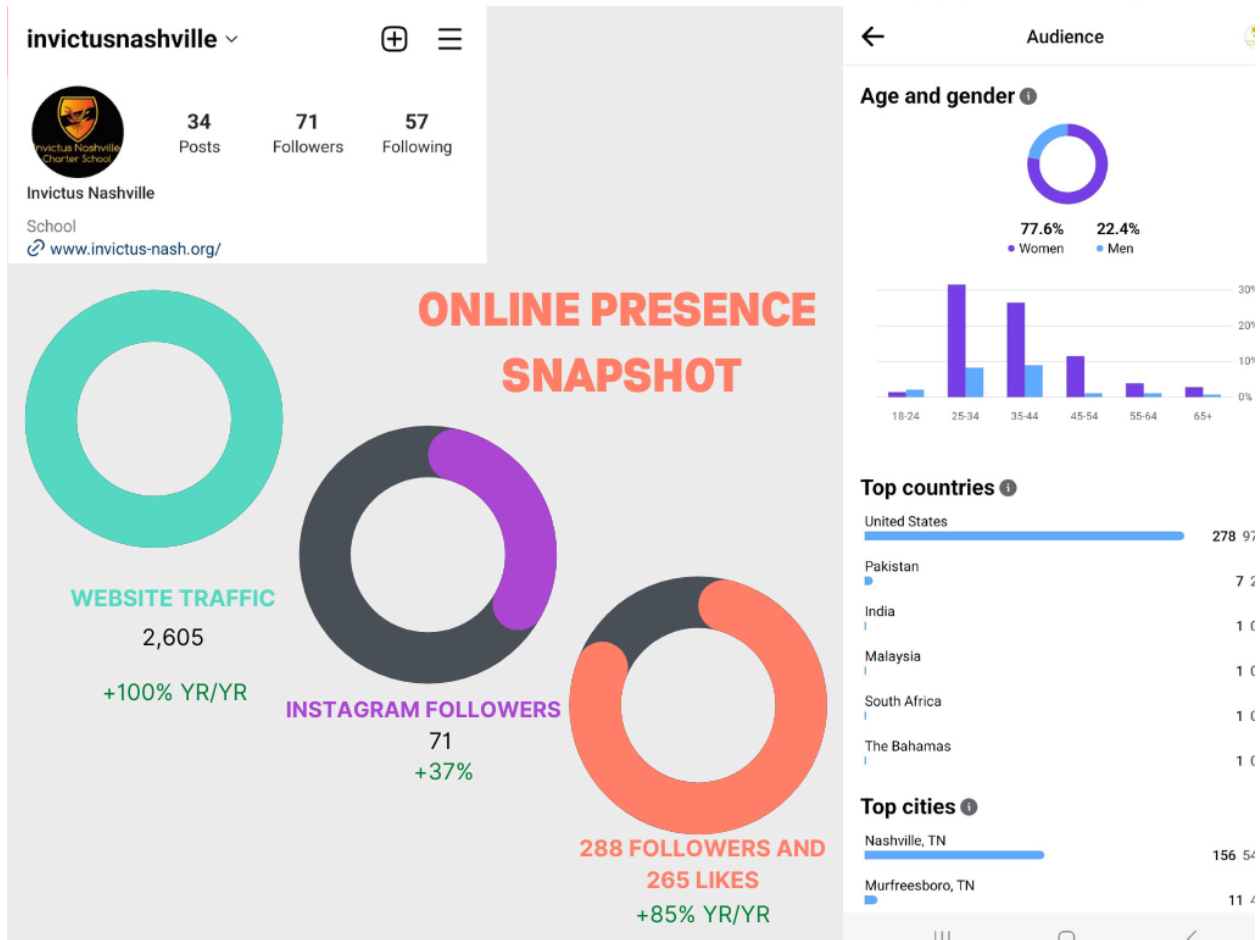


Invictus Nashville Community Engagement SNAPSHOT

Total Engagements	117
Age Eligible Families Reached	180
Davidson County Families Participation	215



SNAPSHOT OF ONLINE PRESENCE



ATTACHMENT F1. ARTICLES OF INCORPORATION

Invictus Nashville Charter School, Inc.

The undersigned, acting as the incorporator of a corporation existing pursuant to the Tennessee Nonprofit Corporation Act, Tenn. Code Ann. § 48-51-101 et seq., as amended (the "Act"), adopts this Charter pursuant to § 48-52-102 of the Act:

1. The name of the corporation is "**Invictus Nashville Charter School, Inc**"
2. The corporation is a public benefit corporation.
3. The street address of the corporation's initial registered office is **2729 Smith Springs Road, Nashville, TN 37217** The name of its initial registered agent at the office is **Brenda Nicole Jones**.
4. The name and address of the incorporator of the corporation is **Brenda Nicole Jones, 2729 Smith Springs Road, Nashville (Davidson County), Tennessee, 37217**.
5. The street address of the principal office of the corporation is **2729 Smith Springs Road, Nashville (Davidson County), Tennessee, 37217**.
6. The corporation is nonprofit.
7. The corporation shall not have members.
8. In the event of the liquidation, dissolution, or winding up of the corporation, and pursuant to Tenn. Code Ann. § 48-64-101, et seq., all of the assets of the corporation, after the payment of the obligations and liabilities of the corporation, shall be transferred to one or more corporations or associations having a similar or analogous character or purpose as may be selected by the corporation's Board of Directors; provided, however, that any transferee shall qualify under the provisions of § 501(c)(3) of the Code, and such assets shall be used by such transferee for purposes substantially similar to those of the corporation. Any such assets not so disposed of shall be disposed of by the Chancery Court of the county in which the principal office of the corporation is then located, exclusively for such purposes.
9. **Invictus Nashville Charter School, Inc** is organized exclusively for charitable purposes and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as now enacted or hereafter amended (the "Code"). Without limiting the foregoing, the principal purposes for which the corporation is organized consist of developing a nonprofit bilingual K–8 charter school in the Metropolitan Nashville Public Schools District in Davidson County. To this end the corporation shall:
 - a. Develop a curriculum based on bilingual education, build community support for the proposed school, and create a charter school application to the benefit of the Southeast Nashville community and families throughout Nashville;
 - b. Engage in such other activities, exercise such other powers and privileges, take such other actions and carry out such other purposes as may be

authorized by the Charter of this corporation and that are permitted to be carried on by an entity either (i) exempt from Federal income taxation under Section 501(c)(3) of the Code, or (ii) to which contributions are deductible under Section 170(c)(2) of the Code; and

- c. Solicit, collect, receive, accumulate and administer and disburse funds in such a manner as will, in the sole discretion of the Board of Directors, most effectively operate to further charitable, scientific, and educational purposes that qualify under section 501(c)(3) of the Code, as amended, or the corresponding section of any future federal tax code.
10. The corporation shall neither have nor exercise any power, nor shall it engage directly or indirectly in any activity, that would invalidate its status (1) as a corporation which is exempt from Federal income taxation as an organization described in Section 501(c)(3) of the Code (or any successor provision to such section), or (2) as a corporation to which contributions are deductible under Section 170, 2055 and 2522 of the Code (or any successor provisions to such sections).
11. Notwithstanding any other provisions of this Charter to the contrary, the following restrictions shall apply to the purposes, operations and activities of the Corporation:
- a. The purposes of the Corporation shall in all events be religious, charitable, scientific, literary or educational within the meaning of Section 501(c)(3) of the Code, and shall be consistent with the requirements of Section 501(c)(3) and recognition of non-private foundation status under Section 509(a) of the Code and all applicable Treasury Regulations issued thereunder;
 - b. No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its directors, officers, employees or other private persons, except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth herein;
 - c. No part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in, nor intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office except as authorized under the Code;
 - d. Notwithstanding any other provision of this Charter, the Corporation shall not carry on any other activities not permitted to be carried on (i) by a corporation exempt from federal income tax under Section 501(c)(3) of the Code, or (ii) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Code; and
 - e. The Corporation shall do any and all lawful things which may be necessary, useful, suitable or proper for the furtherance or accomplishment of the aforesaid purposes and powers of the Corporation and shall exercise all powers possessed by Tennessee corporations of similar character, including but not limited to the power to own, invest in, receive, hold, use, lease, contract for the purchase and sale of, and to mortgage or otherwise encumber, real and personal property. Notwithstanding the foregoing, no loans shall be made by the Corporation to its officers or directors for any purpose whatsoever.

12. The affairs of the corporation shall be managed initially by a Board of Directors. The manner of election or appointment of the Board of Directors of the corporation shall be as provided in its Bylaws.
13. The corporation's Board of Directors shall be comprised of the following natural persons:

Brenda Jones, ex officio
Neysa Taylor
Dawana Wade
John Little III
Courtney Teasley
Penelope Pak-McMillien
Allison McGuire
Dominique Donette

The number of directors which shall constitute the Board of Directors shall be as from time to time fixed by the bylaws, but in no event shall there be less than three (5) directors. Any vacancy occurring in the board of directors, including a vacancy created by an increase in the number of authorized directors, may be filled for the remainder of the full term of office for a director of that class, by the affirmative vote of a majority of directors in office.

14. To the fullest extent permitted by the Act, a director or officer of the corporation shall not be liable to the corporation for monetary damages for breach of fiduciary duty as a director; provided, however, that this provision does not eliminate or limit the liability of a director (i) for any breach of the director's duty of loyalty to the corporation; (ii) for acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law; or (iii) for a distribution that is unlawful. If Tennessee law is amended or modified to authorize corporate action eliminating or further limiting the personal liability of directors, then the liability of a director of the corporation shall thereupon be eliminated or limited, without the necessity of further amendment of this Charter, to the fullest extent permitted by Tennessee law. Any repeal or modification of the provisions of this Article 14 shall not adversely affect any right of protection of a director of the corporation existing at the time of such repeal or modification.

ATTACHMENT F2: PROOF OF NON-PROFIT AND TAX-EXEMPT STATUS



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

INVICTUS NASHVILLE CHARTER SCHOOL
2729 SMITH SPRINGS ROAD
NASHVILLE, TN 37217

Date: 09/29/2022
Employer ID number: 87-4562392
Person to contact: Name: Julie Chen
ID number: 31261
Telephone: 877-829-5500
Accounting period ending: December 31
Public charity status: 170(b)(1)(A)(ii)
Form 990 / 990-EZ / 990-N required: Yes
Effective date of exemption: January 31, 2022
Contribution deductibility: Yes
Addendum applies: No
DLN: 26053476004162

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

Information for Charter Schools

You're not subject to the specific publishing requirements of Revenue Procedure 75-50, 1975-2 C.B., page 587, as long as you operate under a contract with the local government. If your method of operation changes to the extent that your charter is not approved, terminated, cancelled or not renewed, you should notify us. You'll also be required to comply with Revenue Procedure 75-50.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

Letter 947 (Rev. 2-2020)
Catalog Number 35152P

ATTACHMENT F3: BY-LAWS

**BY-LAWS OF
Invictus Nashville Charter School
January 2022**

**ARTICLE I
NAME AND INCORPORATION**

Section 1.1 Name. The name of this organization shall be Invictus Nashville Charter School ("The Corporation").

Section 1.2 Incorporation. The organization shall be a Tennessee corporation incorporated under the laws of that state. The Corporation will be a not for profit corporation and it is intended that it will qualify as a tax-exempt entity under the provisions of Section 501 (c) (3) of the Internal Revenue Code and the laws of the State of Tennessee.

**ARTICLE II
PRINCIPAL OFFICE**

Section 2.1 Principal Office. The principal office of the Corporation shall be located at 2729 Smith Springs Road Nashville, Tennessee, 37217, and the Corporation shall have such other offices at such other places within or without the State of Tennessee as the Board of Directors may from time to time determine or as the business of the Corporation may require. All books and records of the Corporation will be maintained at its principal office.

**ARTICLE III
PURPOSE AND USE OF FUNDS**

Section 3.1 Purpose. The Corporation is organized exclusively for charitable, scientific, literary and educational purposes within the meaning of Section 501(c)(3) of the Code (hereinafter referred to as "Charitable Purposes"). The purpose of the Corporation is to develop and operate a public charter school management organization specializing in grades K- 8. The charter model specializes in dual immersion with a project-based learning pedagogy, supports diverse learners, fosters social and cultural understanding, and promotes equity across socioeconomic populations.

The Corporation is organized to engage in any activity, and to exercise any and all powers, rights and privileges, afforded a nonprofit corporation under the Act. Notwithstanding any other provision of these Bylaws, the Corporation shall not carry on any activities not permitted to be carried on by a corporation organized as a nonprofit corporation under the laws of the State of Tennessee, which is exempt from federal income tax under Section 501(c)(3) of the Code, contributions to which are deductible under Sections 170(c)(2), 2055(a) or 2522(a) of the Code.

Section 3.2 Use of Funds. In making distributions to effectuate the religious, charitable, scientific, literary and educational purposes of the Corporation, as delineated in **Section 3.1** above, the Board of Directors shall have the authority to make distributions of both income and principal in such proportions and amounts as the Board of Directors, in its discretion, determines advisable, provided that all such distributions are consistent with all applicable federal tax laws and regulations, as herein provided. The Corporation is not formed for financial or pecuniary gain; and no part of the assets, income, or profits of the Corporation shall be distributable to, or inure to, the benefit of its directors or officers or any other private person, except as provided in Section 5.8, Section 6.7 and Article X as reimbursement for

expenses or reasonable compensation for services rendered to the Corporation, and except to make payments and distributions in furtherance of the Charitable Purposes of the Corporation, as set forth in the Charter and Section 3.1 above. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation; and no part of the activities of the Corporation shall be the participation in, or intervention in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office.

Section 3.3 Administration of Funds. In the event the Corporation is a private foundation within the meaning of Section 509 of the Code for a taxable year, the Corporation: (a) shall distribute its income for each tax year in such manner so that it will not become subject to the tax on undistributed income imposed by Section 4942 of the Code; (b) shall not engage in any act of self-dealing, as defined in Section 4941 (d) of the Code; (c) shall not retain any excess business holdings, as defined in Section 4943(c) of the Code; (d) shall not make any investments in a manner that would incur tax liability under 4944 of the Code; and (e) shall not make any taxable expenditures, as defined in Section 4945(d) of the Code. In order fully to effectuate the provisions of this Section, the Corporation shall adopt such procedures, and shall otherwise adhere to such administrative requirements as may from time to time be necessary, in order fully to comply with all applicable federal tax laws and regulations.

Section 3.4 Termination of Corporation. The Board of Directors shall have the authority to terminate the Corporation at any time that, by a unanimous vote, it deems such termination appropriate or advisable. In such event, after paying, or making provision for the payment of, all liabilities of the Corporation then outstanding and unpaid, the Board of Directors shall distribute the assets of the Corporation exclusively for Charitable Purposes. Any assets not so distributed shall be distributed to one or more Qualified Beneficiaries, as the Board of Directors shall determine. Any assets not so disposed of by the Board of Directors shall be disposed of by a court having equity jurisdiction in the county in which the principal office of the Corporation is then located, with the distribution of assets to be made for such Charitable Purposes, or to such Qualified Beneficiaries, as such court shall determine.

ARTICLE IV MEMBERS

Section 4.1 Members. The Corporation shall not have members.

ARTICLE V BOARD OF DIRECTORS

Section 5.1 General Powers. The business and affairs of the Corporation shall be supervised by its Board of Directors (sometimes referred to herein as the Board), which shall exercise in the name of and on behalf of the Corporation all of the rights and privileges legally exercisable by the Corporation as a corporate entity, except as may otherwise be provided by law, the Charter, or these Bylaws. The Board of Directors, as the governing body of the Corporation, shall have the authority to receive, administer, invest and distribute property on behalf of the Corporation in accordance with the provisions set forth in these Bylaws.

Section 5.2 Number, Tenure, Qualifications and Election The number of the members of the Board of Directors shall be not less than five (5) nor more than fifteen (15). Directors shall be elected (or re-elected) by the Directors then in office. Directors shall serve for terms of three (3) years with the initial term commencing on the first July 1st after election; provided that

Directors may serve on the Board as a Director, with all duties and powers arising therefrom, prior to commencement of the initial term. A Director may not serve more than nine consecutive years from the commencement of the Director's initial term.

Section 5.3 Annual Meeting. The annual meeting of the Board of Directors shall be held as close as practicable to the end of the Corporation's fiscal year. The purpose of the annual meeting shall be to set organizational and strategic direction for the upcoming fiscal year.

Section 5.4 Special Meetings. Special meetings of the Board of Directors may be called by the Chair, or at the request of any director. The Chair shall fix the time and place of any special meeting.

Section 5.5 Notices. Notice of any special meeting shall be given at least two (2) business days prior thereto. The attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting was not lawfully called or convened. The business to be transacted at, or the purpose of, any special meeting of the Board of Directors must be specified in the notice of such meeting and no other business shall be transacted at that meeting.

Section 5.6 Quorum. A majority of the total number of directors in office shall constitute a quorum for the transaction of business at any meeting of the Board of Directors.

Section 5.7 Participation in Meeting. Each director shall be entitled to one (1) vote upon any matter properly submitted for a vote to the Board of Directors. The affirmative vote of a majority of the directors present at a meeting at which a quorum is present shall be the act of the Board of Directors, except as may otherwise be specifically provided by law, by the Charter, or by these Bylaws. Members of the Board of Directors absent from any meeting shall be permitted to vote at such meeting by written proxies. The members of the Board of Directors, or any committee designated by the Board of Directors, may participate in a meeting of the Board of Directors, or of such committee, by means of conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear one another; and participation in a meeting pursuant to this provision shall constitute presence in person at such meeting. The directors shall be promptly furnished a copy of the minutes of the meetings of the Board of Directors.

Section 5.8 Compensation and Reimbursement of Expenses. No director shall be entitled to receive compensation for services rendered to the Corporation in the person's capacity as a director. Each director may be paid his or her reasonable expenses incurred by the director directly related to the affairs of the Corporation upon prior approval by the Board of Directors and proper substantiation of such expenses.

Section 5.9 Presumption of Assent. A director of the Corporation who is present at a meeting of the Board of Directors at which action on any Corporation matter is taken shall be presumed to have assented to the action taken, unless his or her dissent shall be entered in the minutes of the meeting, or unless he or she shall file his or her written dissent to such action with the person acting as the secretary of the meeting before the adjournment thereof, or forward such dissent by registered mail to the Secretary of the Corporation immediately after the adjournment of the meeting. Such right to dissent shall not apply to a director who voted in favor of such action.

Section 5.10 Removal. Any or all of the directors may be removed for cause or without cause by vote of two-thirds (2/3) of the total number of the voting directors in office. Removal of a director shall also constitute removal as an officer of the Corporation and as a member of all committees of the Board of Directors.

Section 5.11 Resignation. A director may resign his or her membership at any time by tendering his or her resignation in writing to the Chair or, in the case of the resignation of the Chair, to the Secretary. A resignation shall become effective upon the date specified in such notice or, if no date is specified, upon receipt of the resignation by the Corporation at its principal place of business.

Section 5.12 Tennessee Open Meetings Act. Any meeting described herein, whether regularly scheduled, annual, or special, shall comply in all respects with the Tennessee Open Meetings Act.

ARTICLE VI OFFICERS

Section 6.1 Number. There shall be a Chair, Treasurer, and Secretary of the Corporation, each of whom shall be elected in accordance with the provisions of this Article. The Board of Directors may also elect such additional officers as the Board of Directors may from time to time deem necessary or appropriate. Any two or more offices may be held by the same person, except for the offices of Chair and Secretary.

Section 6.2 Election and Term of Office. The officers of the Corporation shall be elected annually by the Board of Directors at its annual meeting and shall serve for the fiscal year immediately following such annual meeting, or until his or her earlier death, resignation, or removal from office in the manner hereinafter provided. If the election of the officers shall not be held at such meeting, such election shall be held as soon thereafter as may be convenient. A retiring officer may succeed himself or herself in his or her office.

Section 6.3 Removal. Any member of the Board of Directors removed from office pursuant to Section 5.10 shall be automatically removed as an officer. The Board of Directors may by a two-thirds (2/3) vote remove any officer when, in its judgment, the best interests of the Corporation will be served thereby.

Section 6.4 Vacancies. A vacancy in any office, because of death, resignation, removal, disqualification, or otherwise, may be filled by the affirmative vote of a majority of the Board of Directors for the unexpired portion of the term.

Section 6.5 Resignation. An officer may resign his or her office at any time by tendering his or her resignation in writing to the Chair or, in the case of the resignation of the Chair, to the Secretary. A resignation shall become effective upon the date specified in such notice, or, if no date is specified, upon receipt of the resignation by the Corporation at its principal place of business.

Section 6.6 Salaries and Expenses. The officers of the Corporation shall not be entitled to receive compensation for services rendered to the Corporation in the person's capacity as an officer. Reasonable expenses incurred by all of the officers of the Board of Directors in the course of coordinating the affairs of the Corporation shall be reimbursed by the Corporation upon proper substantiation.

Section 6.7 Executive Director In addition to the officers described herein, the Corporation shall at all times have a Chief Executive Officer, who shall be an employee of the Corporation, shall serve at the pleasure of the Board, shall report directly to the Board, and shall not be subject to the limitations set forth in Section 6.6 hereof. The Executive Director shall be responsible for the day-to-day operations of the Corporation. The Executive Director shall perform such other duties as may from time to time be prescribed by the Board. The Executive Director shall be a non-voting, ex-officio member of the Board of Directors. At each meeting of the Board of Directors, the Executive Director shall report to the Board on the operations of the Corporation for which he or she has direct responsibility.

ARTICLE VII COMMITTEES

Section 7.1 Standing Committees. The Board of Directors may maintain, or create, such standing committees or ad hoc committees as it may determine from time to time to be necessary or desirable for its proper functioning. Such committees shall consist of at least one (1) Director, as appointed by the Chair, shall be under the control and serve at the pleasure of the Board of Directors, shall have charge of such duties as may be assigned to them by the Board of Directors or these Bylaws, shall maintain a permanent record of their actions and proceedings, and shall regularly submit a report of their actions to the Board of Directors, which shall ratify the actions of each committee. Such committees shall have such authority as the Board of Directors may stipulate.

ARTICLE VIII CONTRACTS, LOANS, CHECKS, DEPOSITS, INVESTMENTS

Section 8.1 Contracts and Employment of Agents. The Board of Directors may authorize any director, officer, or agent to enter into any contract, or execute and deliver any instrument, in the name of and on behalf of the Corporation. The Board of Directors shall be specifically authorized, in its sole discretion, to employ and to pay the compensation of such agents, accountants, custodians, experts, consultants and other counsel, legal, investment, or otherwise, as the Board of Directors shall deem advisable, and to delegate discretionary powers to, and rely upon information furnished by, such individuals or entities. Such authority may be general or confined to specific instances.

Section 8.2 Loans. No loans shall be contracted on behalf of the Corporation, and no evidences of indebtedness shall be issued in its name, unless authorized by a resolution of the Board of Directors. Such authority may be general or confined to specific instances.

Section 8.3 Checks, Drafts, etc. All checks, drafts, or other orders for the payment of money, notes, or other evidences of indebtedness issued in the name of the Corporation shall be signed by such officer or officers, agent or agents, of the Corporation, and in such manner, as shall from time to time be determined by resolution of the Board of Directors.

Section 8.4 Deposits. All funds of the Corporation not otherwise employed shall be deposited from time to time to the credit of the Corporation with such banks, trust companies, brokerage accounts, investment managers, or other depositories as the Board of Directors may from time to time select.

Section 8.5 Investment Authority. The Board of Directors shall be authorized to retain assets distributed to the Corporation, even though such assets may constitute an over

concentration in one or more similar investments. Further, the Board of Directors shall have the authority to make investments in unproductive property, or to hold unproductive property to the extent necessary until it can be converted into productive property at an appropriate time, provided the retention of such property is in the best interest of the Corporation and does not in any way jeopardize the tax-exempt status of the Corporation.

ARTICLE IX STANDARDS OF CONDUCT

Section 9.1 Standards of Conduct. A director or an officer of the Corporation shall discharge his or her duties as a director or as an officer, including duties as a member of a committee: (a) in good faith; (b) with the care of an ordinarily prudent person in a like position would exercise under similar circumstances; and (c) in a manner he or she reasonably believes to be in the best interest of the Corporation.

Section 9.2 Reliance on Third Parties. In discharging his or her duties, a director or officer is entitled to rely on information, opinions, reports, or statements, including financial statements and other financial data, if prepared or presented by: (a) one or more officers or employees of the Corporation whom the director or officer reasonably believes to be reliable and competent in the matters presented; (b) legal counsel, public accountants, or other persons as to matters the director or officer reasonably believes are within the person's professional or expert competence; or (c) with respect to a director, a committee of the Board of Directors of which the director is not a member, as to matters within its jurisdiction, if the director or officer reasonably believes the committee merits confidence.

Section 9.3 Bad Faith. A director or officer is not acting in good faith if he or she has knowledge concerning the matter in question that makes reliance otherwise permitted by Section 9.2 unwarranted.

Section 9.4 No Liability. A director or officer is not liable for any action taken, or any failure to take action, as a director or officer, if he or she performs the duties of his or her office in compliance with the provisions of this Article, or if he or she is immune from suit under the provisions of Section 48-58-601 of the Act. No repeal or modification of the provisions of this Section 9.4, either directly or by the adoption of a provision inconsistent with the provisions of this Section, shall adversely affect any right or protection, as set forth herein, existing in favor of a particular individual at the time of such repeal or modification.

Section 9.5 No Fiduciary. No director or officer shall be deemed to be a fiduciary with respect to the Corporation or with respect to any property held or administered by the Corporation, including, without limitation, property that may be subject to restrictions imposed by the donor or transferor of such property.

Section 9.6 Prohibition on Loans. No loans or guarantees shall be made by the Corporation to its directors or officers. Any director who assents to or participates in the making of any such loan shall be liable to the Corporation for the amount of such loan until the repayment thereof.

ARTICLE X
INDEMNIFICATION AND ADVANCEMENT OF EXPENSES

Section 10.1 Mandatory Indemnification of Directors and Officers. To the maximum extent permitted by the provisions of Sections 48-58-501, et seq., of the Act, as amended from time to time (provided, however, that if an amendment to the Act in any way limits or restricts the indemnification rights permitted by law as of the date hereof, such amendment shall apply only to the extent mandated by law and only to activities of persons subject to indemnification under this Section which occur subsequent to the effective date of such amendment), the Corporation shall indemnify and advance expenses to any person who is or was a director or officer of the Corporation, or to such person's heirs, executors, administrators and legal representatives, for the defense of any threatened, pending, or completed action, suit or proceeding, whether civil, criminal, administrative, or investigative, and whether formal or informal (any such action, suit or proceeding being hereinafter referred to as the "Proceeding"), to which such person was, is or is threatened to be made, a named defendant or respondent, which indemnification and advancement of expenses shall include counsel fees actually incurred as a result of the Proceeding or any appeal thereof, reasonable expenses actually incurred with respect to the Proceeding, all fines, judgments, penalties and amounts paid in settlement thereof, subject to the following conditions: (a) the Proceeding was instituted by reason of the fact that such person is or was a director or officer of the Corporation; and (b) the director or officer conducted himself or herself in good faith, and he or she reasonably believed (i) in the case of conduct in his or her official capacity with the Corporation, that his or her conduct was in its best interest; (ii) in all other cases, that his or her conduct was at least not opposed to the best interests of the Corporation; and (iii) in the case of any criminal proceeding, that he or she had no reasonable cause to believe his or her conduct was unlawful. The termination of a proceeding by judgment, order, settlement, conviction, or upon a plea of nolo contendere or its equivalent is not, of itself, determinative that the director or officer did not meet the standard of conduct herein described.

Section 10.2 Permissive Indemnification of Employees and Agents. The Corporation may, to the maximum extent permitted by the provisions of Section 48-58-501, et seq., of the Act, as amended from time to time (provided, however, that if an amendment to the Act in any way limits or restricts the indemnification rights permitted by law as of the date hereof, such amendment shall apply only to the extent mandated by law and only to activities of persons subject to indemnification under this Section which occur subsequent to the effective date of such amendment), indemnify and advance expenses in a Proceeding to any person who is or was an employee or agent of the Corporation, or to such person's heirs, executors, administrators and legal representatives, to the same extent as set forth in Section 10.1 above, provided that the Proceeding was instituted by reason of the fact that such person is or was an employee or agent of the Corporation and met the standards of conduct set forth in subsection 10.1(b) above. The Corporation may also indemnify and advance expenses in a Proceeding to any person who is or was an employee or agent of the Corporation to the extent, consistent with public policy, as may be provided by the Charter, by these Bylaws, by contract, or by general or specific action of the Board of Directors.

Section 10.3 Non-Exclusive Application. The rights to indemnification and advancement of expenses set forth in Sections 10.1 and 10.2 above are contractual between the Corporation and the person being indemnified, and his or her heirs, executors, administrators and legal representatives, and are not exclusive of other similar rights of indemnification or

advancement of expenses to which such person may be entitled, whether by contract, by law, by the Charter, by a resolution of the Board of Directors, by these Bylaws, by the purchase and maintenance by the Corporation of insurance on behalf of a director, officer, employee, or agent of the Corporation, or by an agreement with the Corporation providing for such indemnification, all of which means of indemnification and advancement of expenses are hereby specifically authorized.

Section 10.4 Non-Limiting Application. The provisions of this Article shall not limit the power of the Corporation to pay or reimburse expenses incurred by a director, officer, employee, or agent of the Corporation in connection with such person's appearing as a witness in a Proceeding at a time when he or she has not been made a named defendant or respondent to the Proceeding.

Section 10.5 Prohibited Indemnification. Notwithstanding any other provision of this Article, the Corporation shall not indemnify or advance expenses to or on behalf of any director, officer, employee, or agent of the Corporation, or such person's heirs, executors, administrators or legal representatives: (a) if a judgment or other final adjudication adverse to such person establishes his or her liability for any breach of the duty of loyalty to the Corporation, for acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law, or under Section 48-58-304 of the Act; or (b) in connection with a Proceeding by or in the right of the Corporation in which such person was adjudged liable to the Corporation; or (c) in connection with any other Proceeding charging improper personal benefit to such person, whether or not involving action in his or her official capacity, in which he or she was adjudged liable on the basis that personal benefit was improperly received by him or her.

Section 10.6 Repeal or Modification Not Retroactive. No repeal or modification of the provisions of this Article, either directly or by the adoption of a provision inconsistent with the provisions of this Article, shall adversely affect any right or protection, as set forth herein, existing in favor of a particular individual at the time of such repeal or modification.

ARTICLE XI NOTICES AND WAIVER OF NOTICE

Section 11.1 Notices. The notices provided for in these Bylaws shall be communicated in person, by telephone, by email transmission, or by mail or private carrier. Written notice is effective at the earliest of (a) receipt, (b) five (5) days after its deposit in the United States mail, if mailed correctly addressed and with first-class postage affixed thereon, (c) on the date shown on the return receipt, if sent by registered or certified mail, return receipt requested, and the receipt is signed by or on behalf of the addressee, (d) twenty (20) days after its deposit in the United States mail, if mailed correctly addressed, and with other than first-class, registered, or certified postage affixed, or (e) in the case of e-mail transmission, when successfully sent to the email address shown on the records of the Corporation. Whenever any notice is required to be given to any director, officer, or committee member of the Corporation under the provisions of the Charter, these Bylaws, or the Act, a waiver thereof in writing signed by the person or persons entitled to such notice, whether before or after the time stated therein, shall be deemed equivalent to the giving of such notice.

**ARTICLE XII
FISCAL YEAR**

The fiscal year of the Corporation shall end on June 30th, or on such other date as may be fixed from time to time by the Board of Directors.

**ARTICLE XIII
AMENDMENTS**

These Bylaws and the Charter may be altered, amended, or repealed, and a new Charter or Bylaws adopted, upon the affirmative vote of two thirds (2/3) members of the Board of Directors at any annual or special meeting, except to the extent that such alteration, amendment, or repeal is inconsistent with Article XIV hereof.

**ARTICLE XIV
EXEMPT STATUS**

The Corporation has been organized and will be operated exclusively for exempt purposes within the meaning of Section 501(c)(3) of the Code and, as such, will be exempt from taxation under Section 501(a) of the Code. The Corporation intends to apply for recognition of its exempt status by filing Internal Revenue Service Form 1023 within the time prescribed under Section 508 of the Code and Treasury Regulation Section 1.508-1(a)(2). Any provision of these Bylaws or of the Charter which would in any manner adversely affect the Corporation's tax exempt status shall be void and shall be deleted or modified as necessary to comply with all applicable federal and state requirements for the maintenance of the Corporation's tax exempt status.

ATTACHMENT F4. CODE OF CONDUCT

INVICTUS NASHVILLE BOARD CODE OF CONDUCT

The Invictus Nashville Charter School, Inc. Board of Directors (Board”) desires to operate in the most ethical and conscientious manner possible; to that end, the Board adopts this Code of Conduct. Each member of the Board agrees that he or she will, and all members of the Board of Directors of the Corporation must:

- A. Recognize the authority of the Board rests only with the Board as a whole and not with individual members and act accordingly.
- B. Ensure, uphold, and abide by all laws, regulations, and rules pertaining to schools issued by the Tennessee State Board of Education, the courts, and any other relevant authority.
- C. Support the delegation of authority for the day-to-day administration of the charter school to the Executive Director and act accordingly.
- D. Ensure and enact decision making grounded on the educational welfare and wellbeing of the children served by Invictus Nashville Charter School without consideration to race, religion, color, sex, income level, or any other irrelevant characteristic.
- E. Ensure and encourage changes only through lawful and ethical processes. Use his or her independent judgment in reaching all decisions.
- F. Refrain from using his/her position on the Board of Directors for personal gain or profit.
- G. Periodically review and evaluate the effectiveness of policies on Invictus Nashville Charter School’s programs and performance. Work with other Board members to establish effective policies for Invictus Nashville Charter school. Make decisions on policy matters only after full discussion at publicly held Board meetings.
- H. Attend and participate in regularly scheduled and called Board meetings. Express opinions before votes are cast, but after the Board vote, abide by and support all majority decisions of the Board.
- I. Comply with the Conflict of Interest Policy of the Board, all applicable laws and State Board of Education Standard, rules, and guidelines.
- J. Exhibit personal conduct that reflects positively on the school.
- K. Make all reasonable efforts to support the school’s mission and personnel.

ATTACHMENT F5: CONFLICT OF INTEREST POLICY

CONFLICT OF INTEREST POLICY

This conflict-of-interest policy is designed to help directors, officers and employees of Invictus Nashville identify situations that present potential conflicts of interest and to provide Invictus Nashville with a procedure which, if observed, will allow a transaction to be treated as valid and binding even though a director, officer or employee has or may have a conflict of interest with respect to the transaction. All capitalized terms are defined in Part II of this policy.

- I. **Conflict of Interest Defined.** For purposes of this policy, the following circumstances shall be deemed to create Conflicts of Interest:

- A. **Outside Interests.**

1. Contract or Transaction between Invictus Nashville and a Responsible Person or Family Member.
 2. A Contract or Transaction between Invictus Nashville and an entity in which a Responsible Person or Family Member has a Material Financial Interest or of which such person is a director, officer, agent, partner, associate, trustee, personal representative, receiver, guardian, custodian, conservator or other legal representative.

- B. **Outside Activities.**

1. A Responsible Person competing with Invictus Nashville in the rendering of services or in any other Contract or Transaction with a third party.
 2. Responsible Person's having a Material Financial Interest in; or serving as a director, officer, employee, agent, partner, associate, trustee, personal representative, receiver, guardian, custodian, conservator or other legal representative of, or consultant to; an entity or individual that competes with Invictus Nashville in the provision of services or in any other Contract or Transaction with a third party.

- C. **Gifts, Gratuities and Entertainment.** A Responsible Person accepting gifts, entertainment or other favors from any individual or entity that:

1. does or is seeking to do business with, or is a competitor of Invictus Nashville; or
 2. has received, is receiving or is seeking to receive a loan or grant, or to secure other financial commitments from Invictus Nashville;
 3. is a charitable organization operating in Tennessee;
 4. under circumstances where it might be inferred that such action was intended to influence or possibly would influence the Responsible Person in the performance of his or her duties. This does not preclude the acceptance of items of nominal or insignificant value or entertainment of nominal or insignificant value which are not related to any particular transaction or activity of Invictus Nashville.

- II. **Definitions**

- A. A "Conflict of Interest" is any circumstance described in Part 1 of this Policy.
 - B. A "Responsible Person" is any person serving as an officer, employee or member of the Board of Directors of Invictus Nashville.

- C. A "Family Member" is a spouse, domestic partner, parent, child or spouse of a child, brother, sister, or spouse of a brother or sister, of a Responsible Person.
- D. A "Material Financial Interest" in an entity is a financial interest of any kind, which, in view of all the circumstances, is substantial enough that it would, or reasonably could, affect a Responsible Person's or Family Member's judgment with respect to transactions to which the entity is a party. This includes all forms of compensation.
- E. A "Contract or Transaction" is any agreement or relationship involving the sale or purchase of goods, services, or rights of any kind, the providing or receipt of a loan or grant, the establishment of any other type of pecuniary relationship, or review of a charitable organization Invictus Nashville. The making of a gift to Invictus Nashville is not a Contract or Transaction

III. **Procedures.**

A. Disclosure

1. Prior to board or committee action on a Contract or Transaction involving a Conflict of Interest, a director or committee member having a Conflict of Interest and who attends the meeting shall disclose all facts material to the Conflict of Interest. Such disclosure shall be reflected in the minutes of the meeting.
2. A director or committee member who plans not to attend a meeting at which he or she has reason to believe that the board or committee will act on a matter in which the person has a Conflict of Interest shall disclose to the chair of the meeting all facts material to the Conflict of Interest. The chair shall report the disclosure at the meeting and the disclosure shall be reflected in the minutes of the meeting.
3. A person who has a Conflict of Interest shall not participate in or be permitted to hear the Board of Directors' or committee's discussion of the matter except to disclose material facts and to respond to questions. Such person shall not attempt to exert his or her personal influence with respect to the matter, either at or outside the meeting.
4. Responsible Persons who are not members of the Board of Directors of Invictus Nashville, or who have a Conflict of Interest with respect to a Contract or Transaction that is not the subject of Board or committee action, shall disclose to the Chair or the Chair's designee any Conflict of Interest that such Responsible Person has with respect to a Contract or Transaction. Such disclosure shall be made as soon as the Conflict of Interest is known to the Responsible Person. The Responsible Person shall refrain from any action that may affect Invictus Nashville's participation in such Contract or Transaction. In the event it is not entirely clear that a Conflict of Interest exists, the individual with the potential conflict shall disclose the circumstances to the Chair or the Chair's designee, who shall determine whether there exists a Conflict of Interest that is subject to this policy.

B. Voting

1. A person who has a Conflict of Interest with respect to a Contract or Transaction that will be voted on at a meeting shall not be counted in determining the presence of a quorum for purposes of the vote. The person having a conflict of interest may not vote on the Contract or Transaction and shall not be present in the meeting room when the vote is taken, unless the

vote is by secret ballot. Such a person's ineligibility to vote shall be reflected in the minutes of the meeting. For purposes of this paragraph, a member of the Board of Directors of Invictus Nashville has a Conflict of Interest when he or she stands for election as an officer or for re- election as a member of the Board of Directors.

2. A quorum is present if a majority of the directors on the board who have no direct or indirect interest in the transaction vote to authorize, approve, or ratify the transaction.
3. A transaction may not be authorized, approved, or ratified under this section by a single director.

C. Approval

1. A transaction in which a director or officer of a corporation has a conflict of interest may be approved if:
2. The material facts of the transaction and the director's or officer's interests were disclosed or known to the board of directors or a committee consisting entirely of members of the board of directors and the board of directors or such committee authorized, approved, or ratified the transaction.
3. The material facts of the transaction and the director's or officer's interest were disclosed and/known to the members and they authorized, approved or ratified the transaction.

IV. **Confidentiality.** Each Responsible Person shall exercise care not to disclose confidential information acquired in connection with such status or information the disclosure of which might be adverse to the interests of Invictus Nashville. Furthermore, a Responsible Person shall not disclose or use information relating to the business of Invictus Nashville for the personal profit or advantage of the Responsible Person or a Family Member.

V. **Review of policy.**

1. Each new Responsible Person shall be required to review a copy of this policy and to acknowledge in writing that he or she has done so.
2. Each Responsible Person shall annually complete a disclosure form identifying any relationships, positions or circumstances in which the Responsible Person is involved that he or she believes could contribute to a Conflict of Interest arising. Such relationships, positions or circumstances might include service as a director of or consultant to a nonprofit organization, or ownership of a business that might provide goods or services to Invictus Nashville. Any such information regarding business interests of a Responsible Person or a Family Member shall be treated as confidential and shall generally be made available only to the Chair, the Executive Director, and any committee appointed to address Conflicts of Interest, except to the extent additional disclosure is necessary in connection with the implementation of this Policy.
3. This policy shall be reviewed annually by each member of the Board of Directors. Any changes to the policy shall be communicated immediately to all Responsible Persons.

ATTACHMENT F6: BOARD MEMBER PROFILES AND SCHOOL LEADER RESUMES

Neysa Taylor

With a communications career spanning more than 20 years, the terms strategic leader, creative communicator and efficient manager are all words that describe Neysa Taylor. Her most recent roles as Senior Communications Manager for two global brands (Amazon & McDonald's), Neysa has a proven track record of merging transparent communication with innovation to create impactful outcomes that drive the business forward. Prior to her venture into corporate communications, Neysa was Director of Communications for the Tennessee Department of Correction. She also spent 15 years as the Emmy Award winning Assignment Editor of WTVF (NewsChannel5) in Nashville, Tennessee. While at WTVF, she was responsible for leading her team through daily news coverage including significant breaking news events such as the May 2010 flood. Neysa also channels her creativity as a podcast host with her show now entering its third season.

Mrs. Taylor is a graduate of Tennessee State University with a B.A. in Speech Communication and Theater and a M.Ed. in Education Administration. In addition to her career, Mrs. Taylor enjoys her work with many area non-profits most of which advance the causes of minorities, women and children.

Dawana Wade

Dawana Wade is the CEO of Salama Urban Ministries, Inc. She is committed to continuing the stellar service that Salama has provided for the past 37 years. Previously, Dawana served in multiple leadership positions within the YMCA of Middle Tennessee and the YMCA of Kansas City. While at the YMCA, she led the capital campaign and subsequent execution of the \$6M renovation and expansion of the Northwest Family YMCA in Nashville. She also earned the distinction of Organizational Leader. Dawana is a proud graduate of Austin Peay State University and Lipscomb University. Dawana holds a Bachelor of Science degree in Psychology and a Master of Arts in Civic Leadership. Dawana is well versed in the areas of youth and community development, strategic planning, and executive coaching. She has served as a consultant and mentor to organizations, churches, and individuals, in these areas.

She has served on the board for the following organizations: Plant the Seed, The Center for Nonprofit Management, The Eighteenth Avenue Family Enrichment Center, and The Carson Group. Dawana is the immediate past co-chair of the SEL Committee of the Education Task Force with Nashville Organized for Action and Hope (NOAH). Dawana is a member of Delta Sigma Theta Sorority, Inc. and Kairos Ebenezer AME Church, but her most important role is that of proud parent of two adult children, Nathan and Dorian, and guardian of Makayla.

John Little III

John is a proud native of Nashville and an MNPS graduate of Stratford High School. John has been recognized by his alma mater, Tennessee State University, as its Distinguished Alumni and by the Nashville Scene as its Top 8 People to Watch and its "Best Political Operative. John's personal and professional life intersects with politics, organizing, and education reform. Currently, John Little works with a local education nonprofit. Previously, he served as a MNPS School Board Member representing Hermitage, Old Hickory, and Donelson. Past highlights include serving on the Governor's Children's Cabinet under Governor Bredesen leading the Youth Mentoring Initiative. John believes that students and parents should be at the discussion table and leading the charge on how we solve the cities' education problems around achievement. John is a loving husband and father of two wonderful children.

Courtney Teasley

Courtney Teasley is a native East Nashvillian. She attended Stratford High School and graduated from Middle Tennessee State University. She received her Law Degree from Nashville School of Law In 2013, she started her own law practice where she currently focuses on Criminal Defense and creating proactive strategies for those disproportionately affected by the American Criminal Justice system. She has made it her personal duty to educate people on their rights under the Constitution and has begun educating her community through her IG Live show: #MondayNightRights. Courtney has served as an Adjunct Professor in the Criminal Justice department at Tennessee State University and has served as the Mock Trial Coach for Stratford STEM Magnet High School She received the 2018 MNPS Business Partner of the Year award for her work as the Mock Trial Coach for Stratford STEM Magnet. Recently, she was the Campaign Manager for Khadija Babb for Criminal Court Judge. Babb successfully unseated a Nashville Criminal Court Judge and is the youngest Criminal Court Judge to sit on a Nashville bench.

Courtney is an active member of the Metro Nashville Alumnae Chapter of Delta Sigma Theta Sorority, Inc., Chair of the Legal Redress Committee for the Nashville Chapter of the NAACP, Chair of the Equality and Justice Committee for the TN Association of Criminal Defense Lawyers, Executive board member for the National Action Network, Chair of the Outreach Committee for the Napier Looby Bar Association, Co-Chair of the DEI Committee for the Davidson County Democratic Party, Democratic Executive Committeewoman for District 9.

Dr. Allison Patten McGuire

Allison is a native Nashvillian. Allison became fascinated with human development when she was a teenager at the YMCA Bridge Program. The YMCA Bridge Program was a students-teaching-students summer program. This experience sparked questions such as: Why are some educational environments profoundly life-changing while others are ineffective? How can making changes in a school or community bolster a person's well-being? She continued her studies at Northwestern University and while working in a psychiatric hospital in Chicago, Allison concluded that maybe helping people live richer, more effective lives came down to improving the places they spend time.

The notion sent her back home to study with Bob Newbrough at Peabody College at Vanderbilt University. In 2004, Allison earned a Ph.D. in Psychology and Human Development, with a dissertation on community engagement among adolescents. She taught courses at Peabody ranging from lifespan development to program evaluation; her specialty and love is systems theory and community psychology. Since 2015, Allison has shifted her focus to partnering with secondary schools and universities to design and implement evaluations of the student experience, with an emphasis on a sense of community and inclusion. Allison is a lifelong member of First Presbyterian Church (Nashville). She loves gardening and spending time with her children, spouse, and dogs.

Dominique Donette

Dominique is a seasoned non-profit professional with over 15 years of experience in the sector. Her career has been dedicated to addressing systemic inequities in education and civil rights through various roles, including teacher, consultant, director, and lobbyist. Dominique earned an M.Ed in Education Policy and Management from Harvard Graduate School of Education, as well as an M.Ed in Educational Leadership as a fellow in the Broad Residency in Urban Education. She completed her undergraduate studies at the University of California at Berkeley, where she was a student activist and double majored in Dance and American Studies with a minor in African American Studies.

Outside of her professional endeavors and her involvement with Invictus, Dominique is a volunteer member of two non-profit boards dedicated to supporting people who have been incarcerated re-enter their communities. She also devotes hundreds of volunteer hours each year to various organizations and campaigns. Dominique is an abolitionist. She believes in treating all humans with respect and as experts in their own lives. She feels fortunate to have had formal schooling and places great value in the wisdom and teachings of her elders. Dominique enjoys cooking, the arts, reading, adventure and spending time with her many siblings and loved ones.

Dr. Brenda Jones

Brenda Jones, Ed.D. (she/her/hers) firmly believes that all students deserve a high-quality education that prepares them for college, career, and life, and that it is her responsibility to provide such an education to children in her hometown of Nashville. Despite the growth of her city, education has been stagnant for many of its citizens. That's why she's committed to founding and leading a school focused on cultivating graduates who will be prepared to become leaders in their communities. Her proposed school will incorporate a culturally sustaining curriculum that will allow students to develop diverse worldviews, as well as training on life skills and habits of success. There will also be a focus on community service, which Brenda believes is essential to ensuring students become successful adults. "It takes a village to raise a child. Our schools need to be embedded in their surrounding communities, and our youth need to develop a heart for service to give back to their 'village.'"

Brenda most recently co-founded Nspire Tutoring Center to support Nashville families with virtual learning during the COVID-19 pandemic. She also served as a school success manager with Gradient Learning, where she coached school leaders on high-quality implementation of project-based learning, mentoring, and the development of student self-direction skills. Prior to this, she was the assistant principal at Knowledge Academies in Antioch, TN and spent seven years as a mathematics teacher and grade team lead in Antioch and Nashville. Brenda received her doctoral degree in leadership and professional practice from Trevecca Nazarene University. She also holds a Master of Education degree in curriculum and instruction from Middle Tennessee State University and a Bachelor of Science degree in psychology and education from Belmont University.

As an ex officio, non-voting member and the proposed Invictus Nashville Executive Director.

Neysa Taylor

Communications Strategist

Neysa Taylor

615.300.7058
ndellery@gmail.com

- Innovative leader who believes that a team's ability to exceed the needs of the customer is directly related to their understanding of the organization's objectives and their role in achieving those objectives
- Visionary strategist possessing the ability to calmly evaluate and execute a crisis communications strategy that simultaneously addresses the concerns of the constituent while garnering wins for the agency
- Engaging and dynamic communicator with an extensive history of reaching various demographics and community stakeholders in correctional settings and in the private sector

Successes

- Led the East Zone Leadership team's international benchmarking trip and co-created the East Zone People Plan
- Implemented a stakeholder management process that resulted in all 7 co-ops voting for \$1 Any Size Drinks (\$ASD) for the McDonald's Nashville Field Office
- Responsible for creating, writing, producing & editing the most attended virtual McDonald's Field Office Summit in 2020
- Created the Tennessee Department of Correction's (TDOC) first magazine entitled *The Mission*
- Implemented new branding standards throughout TDOC including the redesign of the internet and intranet sites
- Executive producer and host for the department's YouTube show, *TDOC Talks*
- Led the TDOC Central Communications Center (dispatch center) and expanded their services to include contraband interdiction
- Conducted communications strategy training for the South Carolina Department of Correction, the Association of State Correctional Administrators, and the National Institute of Corrections

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Experience

Amazon / Senior Communications Manager

April 2022 - PRESENT, Tennessee

- Created all messaging around safety, compliance, and performance metrics for the Delivery Service Partners

McDonald's / Sr. Manager, U.S. Zone & Field Alignment

March 2021 - April 2022, Illinois

- Led the communications strategy for the U.S. East Zone President including stakeholder management and all executive communication needs
- Successfully led the East Zone leadership on an international benchmarking trip to Canada which included curriculum development, coordinating travel logistics with a significant focus on COVID-safety protocols, and the creation of post meeting materials including an East Zone People plan

McDonald's / Field Communications Manager

October 2019 - March 2021, Tennessee

- Led stakeholder management for the Nashville Field Office (NFO), creating all internal communications, and acting as chief of staff for the Field Vice President
- Created the NFO stakeholder management roadmap to help the FLT actively manage the Owner/Operators and drive positive sentiment
- Led the NFO communications strategy – both staff-facing & operator-facing - during the onset of COVID-19.

Tennessee Department of Correction / Director of Communications

February 2014 - October 2019, Tennessee

- Led a top-notch communications team of 7 direct reports and an extended team of 14. This team supports the mission of the Tennessee Department of Correction by using various media methods to leave stakeholders with a greater understanding and positive impression of the department thus enhancing public safety.
- Responsible for the TDOC's dispatch center which oversees GPS alerts, inmate transportation, and emergency communication with other enterprise partners

WTVF NewsChannel5 / Assignment Manager

July 2006 - February 2014, Tennessee

- Led the newsgathering process by securing interviews for stories, researching viewer tips, and responding to breaking news.

Dawana L. Wade
5321 Ryan Allen Circle
Nashville, TN 37189
615.243.5775 (Cell)
Email: dawana.wade@gmail.com

Professional Experience

Aug. 2013 - present Chief Executive Officer
Salama Urban Ministries, Inc., Nashville, TN

Major Responsibilities:

- Responsible for the day-to-day operation of the organization with a budget responsibility of \$1 Million.
- In cooperation with the Board of Directors ensure adequate infrastructure and develop a long range vision for Salama programming and growth.
- Provide vision and strategic direction to the implementation of the financial development plan needed to sustain the organization and programming, to include annual fundraising and building annual and capital reserves.
- Develop a comprehensive evaluation initiative to quantify current and past result of Salama programming.
- Develop alliances with present and potential partners/collaborators, to include church, educational, community, business and legislative leaders and agencies.

Feb. 2011 - April 2013 Sr. VP Mission Services & Urban Outreach
Executive Director – Independence Family YMCA
YMCA of Greater Kansas City, Kansas City, MO

Major Responsibilities:

- Responsible for day-to-day planning, coordination, and management of mission-focused programs and staff, including 4 full facility YMCAs in underserved and traditional communities. Total budget responsibility of \$2.4 Million.
- Develop both strategic and tactical partnerships which support urban outreach programming for the Association.
- Provide leadership for the Mission and Community Impact Council of the Association Board of Directors.
- Ensure effective development and implementation of cause-related outreach programs that support the Y's commitment to youth development, healthy living, social responsibility and urban service.
- Develop a comprehensive evaluation initiative to quantify results of Association youth development programming.
- Lead and co-lead Global Center of Excellence and Diversity & Inclusion efforts.

Key Accomplishments:

- Hired, developed and promoted the Urban Outreach team, increasing Association and center capacity, resulting in increased volunteer support, shared staff resources and enhanced community engagement. Increased team from 3 FT to 9 FT, 4 PT to 13PT.
- Co-led Bridging the Gap Mentoring program resulting in increased part-time associate engagement & promotion to full-time employment.
- Developed strong ongoing partnerships with community agencies, churches and other non-profits, re-establishing YMCA presence in Kansas City's youth and community development community.
- Developed the youth development continuum framework for all outreach efforts of the Association.
- Facilitated the development of a menu of programming to serve under-resourced and disconnected communities through YMCA programming. Increased operating budget from \$450,000 to \$650,000 through increased grant funding, enhanced youth, community and health and wellness programming.

July 2005 – Feb. 2011

Vice President - Community Outreach
Executive Director, Northwest Family YMCA
YMCA of Middle Tennessee, Nashville, TN

Major Responsibilities:

- Supervise 2 full Youth Development Centers with multiple programs, as well as 3 stand alone Youth Development programs within the Association, serving more than 3500 youth annually. Total budget responsibility of \$4 Million.
- Operate a \$1.5 Million center within an under resourced neighborhood. Facility includes 32,000 sq. ft. with full wellness, circuit, group exercise, cycle and multi-purpose rooms, YPlay Child Watch area and outdoor recreational/lap pool.
- Manage full day preschool serving ages 6 weeks – 5 year olds.
- Represent the YMCA of Middle Tennessee on numerous community boards, committees and task forces related to community and youth development
- Supervise a staff team of ten+ exempt, nine full-time and more than 50 part-time and seasonal staff.
- Board and Financial Development.
- Property and Facility Management.

Key Accomplishments:

- Completed extensive renovation and expansion project of \$1.5 Million center within an under resourced neighborhood. Facility size increased to 45,000 sq. ft. and includes the addition of an indoor aquatic center and 5000 sq. ft. of additional wellness space.
- Developed strong, ongoing collaborative partnerships with local agencies including Fifty Forward, area Family Resource Centers, area elementary – high schools, Renewal House Family Shelter, and area colleges and universities. These partnerships have resulted in increased volunteer support, shared staff resources and enhanced community engagement.
- Hired full time literacy director to further enhance quality of preschool and youth programs by providing daily literacy development and support, resulting in increased reading levels for 100% of program participants.
- Managed multiple federal, Y-USA and local grants supporting youth development programming, as well as secured United Way and state grant funding which has been maintained for 7+ years.
- Increased city-wide visibility and reputation of youth development programming and opportunities, through intentional and ongoing staff development and risk management practices.
- Increased total membership units by 21%, from 784 units to 954 through October 2010, through enhanced older adult programs and group fitness offerings, as well as targeted partnership with local schools to increase youth/family memberships.
- Increased size of center board by 40%, from 13 to 21 members. Implemented succession plan within board structure, to include use of structured committees, resulting in more effective board utilization and engagement.

Oct. 2004 – July 2005

Vice President - Youth Development
YMCA of Middle Tennessee, Nashville, TN

Major Responsibilities:

- Continue to serve as Executive Director of the YMCA Youth Development Center
- Directly supervise the Executive Director of an additional youth development center with an annual campaign, fundraising board and state licensed group home.
- Provide program development support, standardization and guidance to the Association Teen Cabinet, made up of youth development professionals representing more than 15 centers.
- Develop and implement Association-wide strategies to evaluate and quantify youth development services throughout the organization.
- Develop and maintain strategic city-wide partnerships to establish the YMCA of Middle Tennessee as a leader in youth development programming within the city of Nashville.
- Implemented research based youth development practices in all youth development programs, including use of Search Institute's Developmental Assets framework.

Key Accomplishments:

- Enhanced quality of programming at additional youth development center, while increasing staff engagement scores at both centers.
- Provided increased staff development opportunities for youth development staff throughout the organization.

Mar. 2001 – Oct. 2004

Executive Director, YMCA Youth Development Center

YMCA of Middle Tennessee, Nashville, TN

Jan. 2000 – Mar. 2001 Senior Program Director, Youth Development Center (formerly Urban Services Center)
YMCA of Middle Tennessee

Nov. 1995 – Jan. 2000 Site Director/Program Director, Urban Services Center
YMCA of Middle Tennessee

May 1992 - Nov. 1995 Case Manager, II,
Meharry Medical College, Nashville, TN

Educational Experience: Academic:
Austin Peay State University
Bachelor of Science Degree – Psychology

Lipscomb University
Master of Arts – Civic Leadership

Professional:
YMCA Multicultural Executive Development Institute – December 2010
YMCA Executive Development Program – May 2001
YMCA Organizational Leader Certification – September 1997
YMCA Evaluating Youth Programs Faculty
YMCA Principles of Youth Work: Working with 12-18 yr olds Faculty
YMCA Middle School Afterschool Director Faculty

JOHN H. LITTLE, III

5007 Bonnavista Drive
Hermitage, TN 37076
615-584-4616
mrjohnlittle@gmail.com

EDUCATION

August 2001-May 2006

TENNESSEE STATE UNIVERSITY

Nashville TN

Bachelors of Business Administration Management

ACHIEVEMENTS

- Civil Groups award recipient and keynote speaker 2019
- Edgehill Bike Club board member 2014-2018
- Tennessee State University Distinguished Alumni award 2015
- MNPS Parent Advisory Council Secretary 2015
- MNPS Parent Advisory Council Parent Rep 2011
- Nashville Scene "Political Operative of the Year" 2014
- Stay on the Go Publication "Top 40 People to Watch" 2014
- Nashville Scene "Top 8 Politico's to Watch" 2014
- Bicentennial Mall State Park Past President 2008
- Nashville NAACP Civic Engagement Co Chair 2007
- Tennessee State Alumni Association Past Vice President 2007
- State of Tennessee Youth Excellence Award Recipient 2006

PROFESSIONAL EXPERIENCE

October 2017-Present

NEW VENTURE FUND (NASHVILLE PROPEL)

Nashville TN

Leadership Coach

- Cultivate parents across country personal leadership to help them advocate for their children
- Teach parents the functions of education and economic systems work on the local and state level
- Coach parents with experience and heart to cultivate a network in the local community that develops educated and engaged parents around education

January 2014-October 2017

LITTLE SMITH STRATEGIES

Nashville TN

Managing Partner

- Developed strategic campaigns that empowered organizations to develop internal growth
- Created intersections with clients that helped them harness their ability to connect with people
- Developed successful strategy for education, community and political groups around the country

October 2013-February 2015

TENNESSEE CHARTER SCHOOL CENTER

Nashville TN

Director of Community Engagement

- Developed outreach plans for engagement and action with parent networks across the state
- Facilitated our annual "Day on the Hill" legislative day by organizing over 700 people
- Created a one of its kind parent organization led group that advocated on the local and state level

January 2011- October 2013

NASHVILLE PREP CHARTER SCHOOL

Nashville TN

Founding Director of Student Recruitment | Dean of Students

- Led enrollment and outreach in the North Nashville
- Worked with students and parents to create discipline and reward systems that fostered positive school culture
- Worked with the parents teachers and students to create an environment that created joy and academic rigor within a community

May 2005- March 2007

GOVERNOR'S CHILDREN'S CABINET

Nashville TN

Lead Recruiter

- Worked with municipal, state, and federal officials to develop statewide structure for the governor's mentoring initiative .
- Planned, organized and created over 300 mentor/mentee connections within the program
- Served as the state's spokesman for the governor's program

Courtney A. Teasley

Attorney at Law
615 Main Street, Suite M22
Nashville, TN 37206
www.cteasleylaw.com

Courtney Teasley
Attorney
Courtney@CTeasleylaw.com

Licensed in TN
Phone:(615) 521-1178
Facsimile: (615) 301-5804

Education

Nashville School of Law, Nashville, TN
Juris Doctorate, 2012

- Moot Court (Trial and Appellate)
- Black Law Student Association President

Middle Tennessee State University, Murfreesboro, TN
Bachelor of Science, Political Science, 2008
Minor in Spanish

- Cum Laude Honors
- Delta Sigma Theta Sorority, Inc.
- NAACP member

Professional Work Experience

Licensed in Tennessee, BPR #031754

The Courtney Teasley Law Firm, LLC **June 2013-Present**
615 Main Street, Suite M22
Nashville, TN 37206
Sole Practitioner

Nashville lawyer specializing in criminal law and proactive solutions to mass incarceration.

Babb For Judge **Jan 2022-Sept 2022**
5570 Knob Rd.
Nashville, TN 37209
Criminal Court Campaign Manager

- TN Association of Criminal Defense Lawyers- Chair of the Equality and Justice Committee
- Davidson County Democratic Party- Executive Committee member
- Co-Chair of Diversity, Equity and Inclusion for Davidson County Democratic Party
- National Action Network- Board Member, Chair of Legal Committee
- TN Alliance for Black Lawyers- Napier Looby Chapter– Chair of Community Outreach
- TN Trial Lawyers Association-member
- Delta Sigma Theta Sorority, Inc., Nashville Metro Alumnae Chapter – current, financial member
- American Federation of Government Employees – Union steward (2012-2013)
- Nashville Dept. of Veterans Affairs Employees’ Association – President (2012-2013)

Professional References Available Upon Request

Allison Patten McGuire, Ph.D.

apmcguire@gmail.com

(615) 414-3429

EDUCATION AND TRAINING:

2005 **Ph.D. Vanderbilt University, Peabody College, Psychology and Human Development.** Dissertation: *Generativity in adolescents.* (Advisor: J.R. Newbrough).

2000 **M.S. Vanderbilt University, Peabody College, Psychology and Human Development.** Thesis: *The meaning of the construct of psychological sense of community at the Bridge Program* (Advisor: J.R. Newbrough).

1999 **B.S. Ed. Northwestern University, School of Education and Social Policy Evanston, IL, Major: Human Development and Psychological Services,** Cum laude. Thesis: *In search of the silver lining: Redemption sequences in life story narrative* (Advisor: Dan McAdams).

PROFESSIONAL EXPERIENCE

2017- present. Program evaluator. Conduct evaluation of student experience for undergraduate and graduate student experience at secondary schools and universities, particularly around issues of diversity, equity, and inclusion. Collaborate with administration to develop evaluation goals. Create data collection plan and tools. Conduct mixed methods evaluation. Analyze data and prepare findings for review by administration, board, and other school stakeholders.

August 2010- May 2016. *Adjunct Assoc. Professor,* Human and Organizational Development. Peabody college at Vanderbilt University.

June 2005- December 2007. *Lecturer,* Human and Organizational Development. Vanderbilt University.

June 2003-May 2005. *Instructor,* Human and Organizational Development, Vanderbilt University.

August 2002-August 2003. Research fellow, Consortium on Negotiation and Conflict Resolution, Georgia State University.

January 2001- August 2001. *Executive Director,* The Bridge Program of the YMCA. Responsible for funding, designing, and implementing academic enrichment program for 200 adolescents, including relationship management with all students' families, curriculum design, and hiring and supervising 70 high school and college-aged employees. Helped lead the Bridge through the transition from being a start-up to an

Dominique Donette
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RELEVANT PROFESSIONAL EXPERIENCE

SELF EMPLOYMENT, Consultant, Remote 1/15-Present
Fractional services provided: digital marketing, recruitment, research, policy, communications, sales and fundraising
• Client Short List: Urban Ed Academy, PopCom Tech, Neighborhood Wellness Foundation, Sacramento Links, Inc., Partnership for Los Angeles Schools, Boston Public Schools, California WrapAround, Second Chances Thrift, CWCLA

CA/HI STATE CONFERENCE NAACP, Legislative and Public Affairs Specialist, Sacramento, CA, 4/21-4/22
Managed efforts related to legislation and public affairs for oldest and largest civil rights organization in America
• Actively tracked, lobbied and managed 30 bills; increased presence amongst Black Legislative staff and Capitol Community
• Managed social media platforms and strategy to increase brand awareness (Twitter, Facebook, Instagram, Email campaigns)
• Executed volunteer and constituent activations, including Volunteer Text campaign (over 300k texts) and Virtual Town Halls

SAN FRANCISCO UNIFIED SCHOOL DISTRICT, Special Asst. to the Superintendent, San Francisco, CA, 9/19-8/20
Advised the Superintendent, Board of Education & staff on best practices for supporting Black students (7k of 55k students)
• Managed budget of 3 Million and a team of 5 full-time staff responsible for design/implementation of projects and policies
• Facilitated leadership pathways & support for current & emerging Black leaders resulting in hiring 15% more Black teachers
• Designed policy & monitoring systems to achieve & communicate progress toward goal of increasing Black student success
• Produced the African American Achievement & Leadership Initiative Annual Report, which details District initiatives that are working to improve the educational experience of Black students and call out priorities; readership of 60K plus
• Audited district wide practices of serving Black students/families/staff and pivoted directions resulting in creation of more accountability systems; 1 million dollars extra in funding for expansion and continued votes of approval from Board members

CITIZENS of the WORLD LOS ANGELES 6/16-9/19
Sr. Manager, Diversity and Student Outreach (6/18-9/19)
Regional lead focused on growth of programs & enrollment; DEI initiatives; strategic outreach and marketing
• Audited existing DEI practices and researched best practices in the field; drove strategy to implement findings and other DEI initiatives at the staff, parent & employee levels leading to increase in satisfaction survey ratings
• Developed content for diversity and inclusion education programs resulting in trained staff system wide
• Designed collateral and marketing materials (internal/external) and managed brand awareness (canvassing, social media); measured, tracked and reported progress; Efforts led to retention of diverse staff & students
Manager of Special Projects (6/16-6/18)
Project Managed: Governance; Socio-Emotional Learning; Diversity & Inclusion; Parent Advocacy; Communications
• Led parent advocacy efforts, resulting in the collection of over 5,000 signatures and a positive LAUSD charter vote
• Hired and Managed a street team of 15 employees to increase school presence resulting in 20% diversity enrollment increase

Marshall Tuck for State Superintendent of Public Instruction, Campaign Coordinator, Los Angeles, CA, 9/13-11/14
Managed Candidate's time, fundraising events, campaign appearances, travel, general scheduling, and office management
• Planned 60 fundraisers resulting in 2.5 million dollars raised; Relationship manager for African American voter outreach

Kids Rethink New Orleans Schools, Program Coordinator/Facilitator, New Orleans, LA, 6/09-8/09 & 7/10-8/11
Core member of team that promoted skill building and leadership development of New Orleans youth and city-wide policy change
• Drove 10 youth led policy campaigns; Developed strategies for literacy resulting in all students reading at grade level

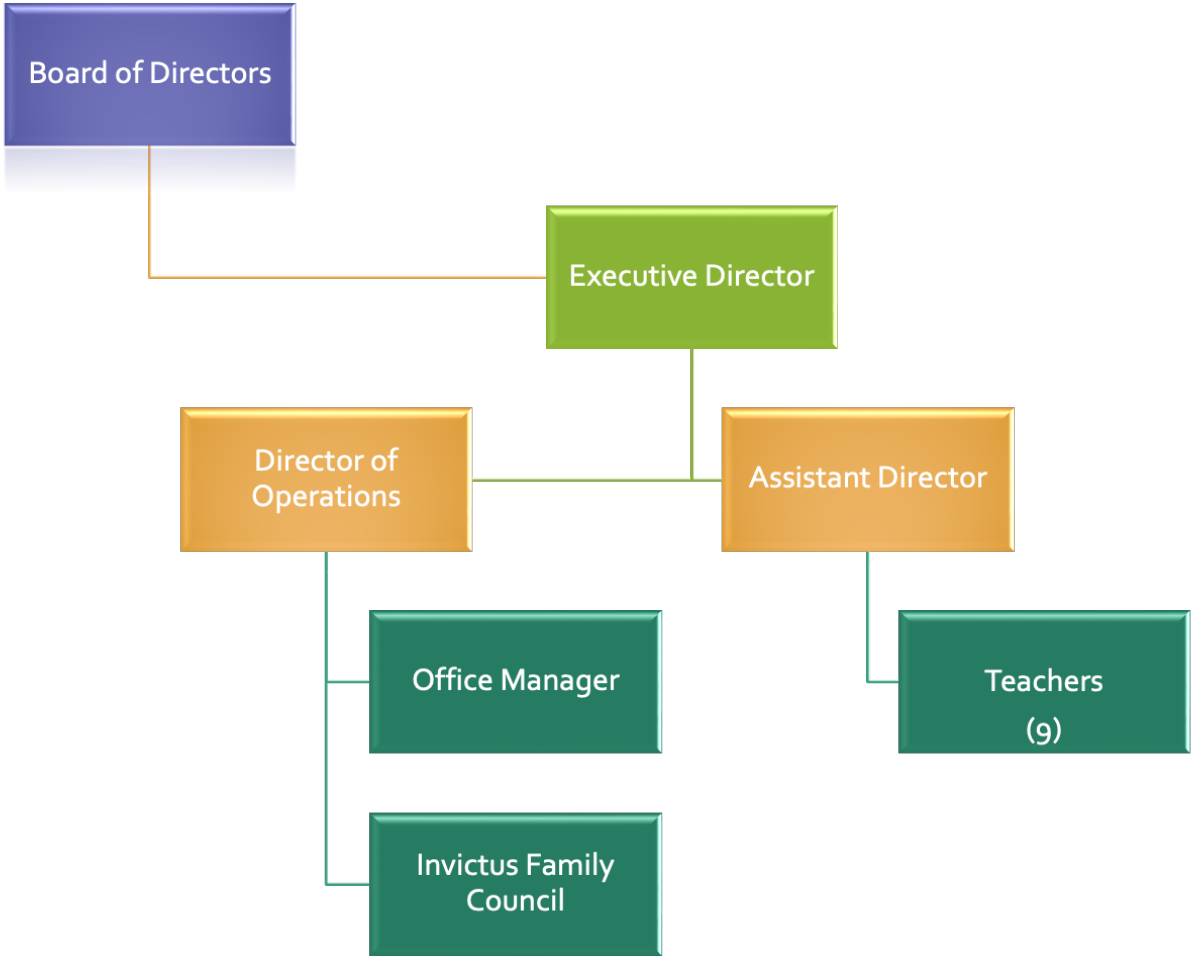
UC Berkeley-Residential and Student Services, African American Theme Program Advisor, Berkeley, CA, 7/06-5/10
Managed the African American Theme Program, a 60 student, yearlong, community service-racial affinity residential hall.
• Quadrupled yearly budget through fundraising enabling an expansion of inclusion & cultural diversity programming

EDUCATION

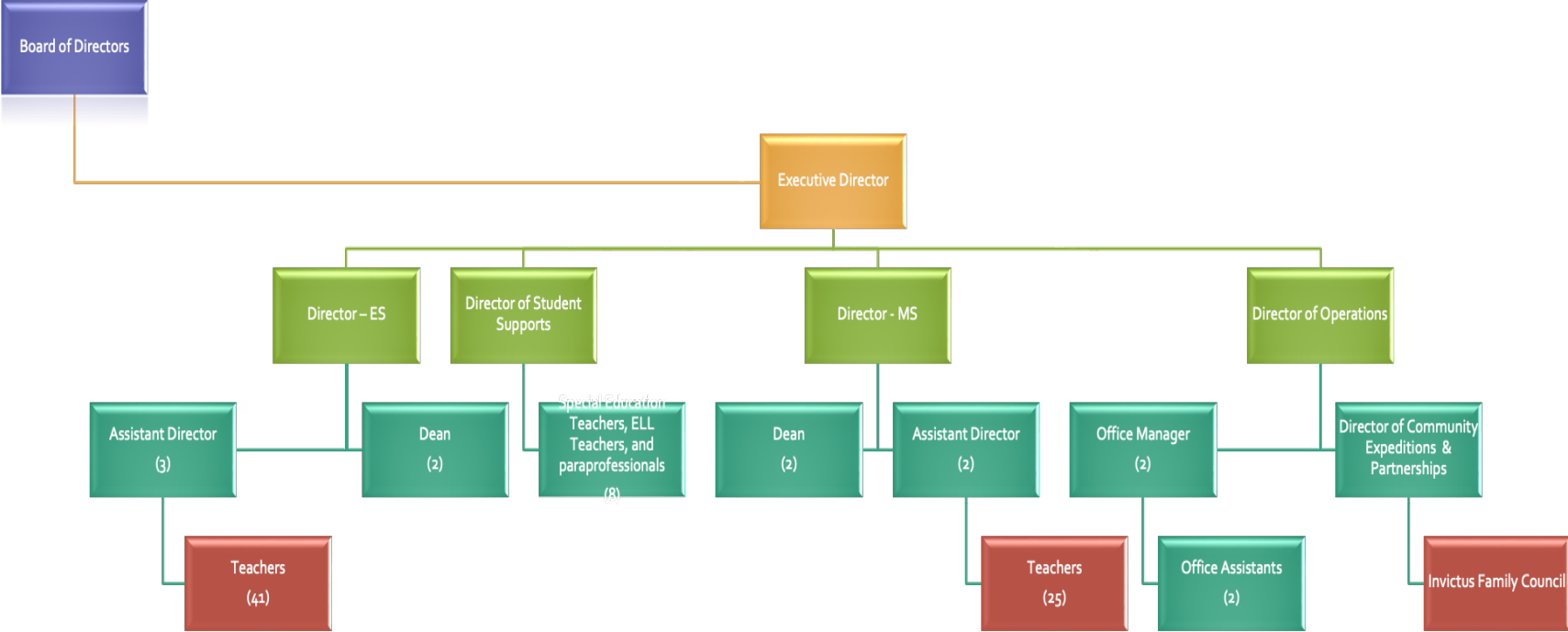
The Broad Center- Broad Residency in Urban Education, M.Ed., Educational Leadership
Harvard Graduate School of Education, M.Ed., Education Policy and Management (EPM)
University of California, Berkeley, B.A., Double Major: American Studies and Dance Minor: African Am. Studies; Gates Scholar

ATTACHMENT G: ORGANIZATIONAL CHART

Invictus Nashville Organizational Chart—Year 1



Invictus Nashville Organizational Chart—At Scale



ATTACHMENT H: STUDENT ACHIEVEMENT DATA

**EDUCATOR
ADMINISTRATOR**

Dr. Brenda Jones

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Nashville, TN 37217

(615) 438-0551
bjones@fellow.bes.org

EDUCATION

Doctor of Education in Educational
Leadership Trevecca Nazarene University
2016 – 2018

Master of Education in Curriculum &
Instruction
Middle Tennessee State
2015 – 2016

Bachelor of Science in Education &
Psychology
Belmont University
2006 - 2011

CERTIFICATIONS

440 Middle Grades Professional
License
Google Certified Foundational
Trainer

**CORE
COMPETENCIES**

Google Platforms
Microsoft Office & Outlook
Summit Learning Platform
Mathematics Common Core
Classroom Management
Professional Development
Project- Based Learning
Scheduling & Testing
Team Building
Curriculum Planning
Data Analysis

PROFESSIONAL EXPERIENCE

BES Fellow

Build, Excel, Sustain Organization 2021 - present

- Build and lead founding board
- Write charter application based on school design observed in exemplar schools and the needs of the community
- Submit charter application with board of directors
- Mobilize community support for the school
- Shift founding board to governing board
- Transition from Fellow to School Leader
- Recruit and hire mission-aligned staff
- Enroll students through robust community outreach
- Develop curriculum and assessments
- Secure facility for start-up years of school
- Create a plan to ensure that students, families, and staff embrace school design
- Welcome founding cohort of students
- Lead students on the path to academic and non-academic excellence
- Maintain sound governance through active work with board members
- Continue to hire staff, recruit students, and write curriculum in preparation for future years
- Continue to lead staff, students, and families on the path to academic and non-academic excellence
- Sharpen academic focus, operational systems, and school culture
- Develop a leadership bench for future school growth

School Success Manager

Summit Learning 2019 - present

- Support execution of and thought partner on strategies for effective change management at the school and district levels.
- Engage in leader coaching with school and district leaders to support their skills in monitoring data and leading instructional practices to sustain priority conditions at their site by making recommendations and customizing coaching plans.
- Serve as the primary contact for school and district leaders and manage a portfolio of schools through the adoption and continued implementation phases of Summit Learning.
- Manage and expand district relationships for districts in your portfolio.
- Monitor and surface any key vulnerabilities that jeopardize the successful adoption/ implementation of the Summit Learning Program.
- Engage with leaders to strategically prioritize key leadership actions that lead to implementation quality and student outcomes by utilizing influence skills to ensure follow through.
- Serve as a liaison to broader team-level initiatives and on cross-functional teams to represent the partner experience
- Create coaching plans with defined outcomes, accountabilities, and milestones in collaboration with school partners.
- Facilitate both live and virtual (e.g. Summer, Fall, and Spring Trainings), for partner school leaders and teachers

**EDUCATOR
ADMINISTRATOR****Dr. Brenda Jones**2729 Smith Springs Road
Nashville, TN 37217(615) 438-0551
bjones@fellow.bes.org**EDUCATION**Doctor of Education in Educational
Leadership Trevecca Nazarene University
2016 – 2018Master of Education in Curriculum &
Instruction
Middle Tennessee State
2015 – 2016Bachelor of Science in Education &
Psychology
Belmont University
2006 - 2011**CERTIFICATIONS**440 Middle Grades Professional
License
Google Certified Foundational
Trainer**CORE
COMPETENCIES**Google Platforms
Microsoft Office & Outlook
Summit Learning Platform
Mathematics Common Core
Classroom Management
Professional Development
Project- Based Learning
Scheduling & Testing
Team Building
Curriculum Planning
Data Analysis**PROFESSIONAL EXPERIENCE****Founder**

Nspire Tutoring Center 2020 – 2021

- Created norms, routines, and procedure for tutoring center to support low-income families during virtual learning for the pandemic.
- Created a sliding scale that allowed parents to work while we supported their children
- Created websites and marketing materials
- Hosted open houses and informational following safe Covid protocols
- Hired teachers to support students during virtual learning
- Managed payroll and accounting budgets for the business
- Tutored K-12 students and supported technology application
- Monitored teacher support of students and created individualized support plans
- Followed IEP accommodations and served as a liaison to families during the pandemic
- Provided Covid safe enrichment and socialization activities for K-12 students during the pandemic
- Hosted after-care for parents during the pandemic

Academic Dean/Assistant Principal

Knowledge Academies 2017 - 2019

- Created a climate hospitable to education and shaped a vision of success for all students and teachers.
- Managed teachers, data, and processes to support school improvement plan
- Provided instructional coaching by working with teachers and the academic leadership team to improve instruction.
- Developed and provided updates to teaching strategies and lesson plans in the traditional setting and the project-based learning Summit Platform model.
- Provided assistance to instructional staff members and recommended changes if required.
- Maintained accountability regarding online gradebook, SMS, and Summit Learning Platform.
- Collaborated and planned with the School Director, Culture Team, and Academic Leadership Team to provide professional development opportunities for teachers and parents
- Performed TN TEAM Evaluations for instructional staff.
- Collaborated with the Managing Director of Student Services to ensure 100% compliance with all ELL and Special Education requirements including scheduling and curriculum accommodations/modifications.
- Coordinated RTI and ensured 100% fidelity of implementation
- Coordinated all testing including universal screeners, benchmark exams, TN Ready exams.
- Coordinated substitute teacher coverage, covering classes as needed.
- Planned and coordinated school field trips, dances, and promotion ceremonies.
- Created systems and procedures for expanding the Summit Learning Platform.
- Aligned the Summit curriculum with Tennessee State Standards for core subjects for grades 5 – 8 by creating a scope and sequence.
- Served as the liaison for the Summit Learning Community and Knowledge Academies .

<p>EDUCATOR ADMINISTRATOR</p>	<p>Dr. Brenda Jones</p>
<p style="text-align: center;">RESEARCH</p> <p>Doctor of Education Dissertation (8/2018)</p> <p>Belmont Undergraduate Research Symposium (5/2010)</p> <p>Student Undergraduate Research Symposium (12/2010)</p> <p style="text-align: center;">REFERENCES</p> <p>Amy Huffman Nashville Charter School Incubator (646)5915960</p> <p>Chaundria Smith Senior Director of Leadership Development (617) .227.4545</p> <p>Amber Green (314) 479-6209 Director of ESA Program</p> <p>Reginald Epps TDOE – Special Populations Coordinator (901) 606-4205</p> <p>Robert Nardo Executive Director – Libertas Memphis 901-654-7788</p> <p>Roy Renfro Curriculum Specialist (615) 587-4379</p> <p>Elizabeth Amato Assistant Director (201) 803-9887</p>	<p style="text-align: center;">PROFESSIONAL EXPERIENCE</p> <p>Team Lead – 8th Grade Math Teacher 2015 – 2017 Knowledge Academies</p> <ul style="list-style-type: none"> Implemented engaging, effective lessons for mixed ability ESL classes with appropriate modifications and accommodations for 8th grade Developed, reorganized, and created class and testing schedules for the 8th grade team to accommodate the Summit Learning Platform and student needs. Worked collaboratively with other teachers and professionals to analyze data, plan lessons, create and score interim assessments, and model strategies. Led the launch of an innovative online curriculum platform for the 8th grade Organized and facilitated biweekly team meetings with 8th grade teachers. Collaborated with leadership team to help develop the School Improvement Plan Co-Facilitated data and behavioral professional development opportunities for teachers Completed S-Team paperwork and facilitated meetings for at-risk students. <p>7th Grade ESL Math Teacher 2014 - 2015 Cameron College Preparatory</p> <ul style="list-style-type: none"> Implemented engaging, effective lessons for mixed ability ESL classes with appropriate modifications and accommodations for 7th grade Worked collaboratively with other teachers and professionals to analyze data, plan lessons, create and score interim assessments, and model strategies. Earned a Level 5 Effectiveness score from a combination of observations, TVAAS, and TCAP scores. <p>7th & 8th Grade Math and Science Teacher 2012 - 2014 Boys Prep Nashville</p> <ul style="list-style-type: none"> Developed and implemented engaging, effective lessons for full inclusion 7th grade mathematics, and Algebra I, and science students Worked collaboratively with other teachers and professionals to creative effective lessons that met the needs and abilities of all students. Earned a Level 4 Effectiveness score from a combination of observations, TVASS, and TCAP scores. <p style="text-align: center;">ACTIVITIES</p> <p>Aspiring Leader 2016 – 2019</p> <ul style="list-style-type: none"> Professional development in data analysis and school improvement Developed and implemented school improvement plan for grades 5-8 Launched and led competency- based learning platform in the 8th grade. <p>Nashville Teacher Residency Mentor 2016 – 2017</p> <ul style="list-style-type: none"> Provided school policies and procedures to orient the clinical student to the faculty, staff, school, and community. Acquainted the teacher candidates with pupils’ needs, the curriculum patterns, and the various types of plans for instruction used in the school and classroom. Demonstrated a variety of effective teaching and management techniques. Provided frequent encouragement, constructive criticism, and recognition of success. Regularly discussed the teacher candidates’ strengths and weaknesses and made specific suggestions for improvement of performance. Conducted formative and summative assessment conferences in collaboration with the Nashville Teacher Residency mentor and teacher candidate. <p>Lead Data Specialist (Boys Prep Nashville) 2012 – 2014</p> <ul style="list-style-type: none"> Organized staff meetings to determine student growth on state standards using high stakes assessment data Helping teachers develop action plans to improve student academic performance. Participated in parent conferences with data collected from high-risk stakes assessments, faculty and team meetings, IEP meetings with functional behavior assessment tracking data to design, create, and implement behavioral modifications.

ATTACHMENT I: EMPLOYEE MANUAL/PERSONNEL POLICIES



Invictus Nashville Charter School
Employee Handbook
2024—2025

INTRODUCTION

Welcome to Invictus Nashville Charter School! We're excited to have you on our team and look forward to your many contributions toward our mission.

"Invictus Nashville will prepare our K-8 students to become engaged members of society by helping them identify their unique path to personal and professional success. Through a diverse culture, personalized learning, and community service, Invictus Nashville graduates will be equipped with the necessary habits of success and a heart for service in their communities"

Our Employee Handbook has two purposes:

1. Summarize all employment related information, policies, and procedures in one document
2. Provide a practical resource for new and returning Invictus Nashville Charter School employees

Please review this handbook carefully and direct any clarifying questions you have to the Invictus Nashville Charter School Executive Director Thank you!

EMPLOYMENT POLICIES

The following are foundational terms of your employment at Invictus Nashville Charter School.

Equal opportunity employment

Invictus Nashville Charter School is an equal opportunity employer. We afford equal employment and advancement opportunities to all qualified individuals without regard to race, creed, color, religion, national origin, ancestry, sex, sexual orientation, age, physical or mental disability, marital status, citizenship status, medical condition, or any legally protected status. This policy extends to all employees and to all aspects of the employment relationship, including the hiring of new employees and the training, transfer, promotion, compensation, benefits, and termination of existing employees.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, Invictus Nashville Charter School will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result. To request an accommodation, please speak with your immediate supervisor.

Employment at will

Tennessee is an “at will” state, and unless stated otherwise, Invictus Nashville Charter School employees have an “at will” relationship with Invictus Nashville Charter School. This means:

1. You are employed for an indefinite/unspecified time period, and
2. Either you or Invictus Nashville Charter School may terminate your employment at any time, with or without cause, and with or without notice.

Later sections of this handbook will address topics like our discipline policies and grounds for termination. Nothing contained in this document, employment applications, memos, or other materials will alter the at-will employment relationship or otherwise restrict Invictus Nashville Charter School’s right to terminate an employee at any time for any reason.

Categories of employment

Invictus Nashville Charter School complies with the Fair Labor Standards Act (“FLSA”) and all other applicable federal and state wage and hour laws.

- ♦ **Non-exempt employees:** According to the FLSA, non-exempt employees are entitled to receive overtime pay at a rate of one and one half their regular rate for all hours worked in excess of forty (40) hours in a work week. Non-exempt employees’ rates of pay are typically stated in terms of hourly rates. Non-exempt employees must accurately report hours worked each day and the total for each work week. Additionally, Non-exempt employees are prohibited from working “off the clock,” even voluntarily. Non-exempt employees may not work overtime without the expressed consent of their supervisor, a principal, or the CEO. Failure to obtain consent prior to working overtime may result in disciplinary action, up to and including termination. Hourly employees will be paid for all hours worked.
- ♦ **Exempt employees:** All other employees are considered exempt employees. Exempt employees’ rates of pay may be stated in terms of a monthly or annual salary (although this does not mean

that such employees are employed for any definite period of time). Exempt employees are not compensated for overtime (i.e., hours in excess of 40 in a workweek).

In addition to the above categories, employees will belong to one or more of the categories below:

- ◆ Full-time: Over thirty (30) hours or above each week
- ◆ Part-time: Under thirty (30) hours each week
- ◆ Temporary employment: Employees who are hired for a specific time frame.
Temporary/seasonal employees are not eligible to participate in employee benefits.

Harassment policy & procedure

All employees must be able to work in an atmosphere free from discrimination and harassment. Invictus Nashville Charter School neither condones nor tolerates harassment of any type by any employee. This policy applies to all employee actions and relationships, regardless of position or gender. Invictus Nashville Charter School will promptly investigate any complaint of harassment and take appropriate corrective action, if warranted.

Conduct can constitute harassment when:

- ◆ Submission to such conduct is made either explicitly or implicitly a term or condition of employment.
- ◆ Submission to or rejection of such conduct is used as the basis for personnel decisions, including appraisals, promotion, salary increases, and termination.
- ◆ Such behavior has the purpose or effect of interfering with an individual's performance on the job or creating an intimidating, hostile, or offensive working environment.

Any employee who has experienced or is aware of a situation that he or she believes to be harassing has a responsibility to report the situation immediately to a Co-director.

All complaints of harassment will be investigated promptly, objectively, and as confidentially as possible. Employees are required to cooperate in any investigation. Retaliation against any employee for filing a complaint or participating in an investigation is prohibited and shall be cause for termination.

Background checks

The Metropolitan Nashville Public School District requires fingerprinting and criminal background clearance for all employees. Willful falsification of employment documents or omission of information by applicants will result in the withdrawal of the offer of employment. Employees found to have falsified employment documents are subject to immediate termination. Fingerprint and background clearance must be received by Invictus Nashville Charter School before any employee may start work.

Immigration law compliance

All offers of employment are contingent upon verification of the employee's authorization/right to work in the United States. Before employment commences, the employee will be asked to complete a Federal I-9 Employment Eligibility Form and provide supporting documentation. If the employee cannot verify his/her right to work in the United States, Invictus Nashville Charter School reserves the right to revoke the employment offer or terminate employment.

THE WORKPLACE

Alcohol & drug-free workplace

Invictus Nashville Charter School is committed to providing a drug-free and alcohol-free workplace. Invictus Nashville Charter School seeks to promote safety in the workplace, employee health and well-being, student and family confidence, and an environment conducive to attaining high work standards. The use of drugs and alcohol by employees jeopardizes these goals because it adversely affects health and safety, security, productivity, and public confidence and trust.

The bringing to the workplace, possession, or use of intoxicating beverages or drugs on any Invictus Nashville Charter School premises is prohibited and will result in disciplinary action up to and including termination.

Some work-related events (including those not sponsored by Invictus Nashville Charter School) may serve alcoholic beverages. All state and federal guidelines must be enforced during these events, and employees are expected to use good judgment in these situations.

If you believe you have a drug or alcohol problem, we encourage you to seek help. Invictus Nashville Charter School will handle all related discussions or referrals for treatment with strictest confidentiality. If you enter an alcohol or drug rehabilitation program voluntarily and request a leave of absence to do so, Invictus Nashville Charter School will make every reasonable effort to grant the leave.

All Invictus Nashville Charter School employees are subject to random drug testing.

Smoking

In the interest of the health and safety of students and employees, smoking is prohibited on Invictus Nashville Charter School premises.

Attendance & tardiness

Invictus Nashville Charter School depends heavily upon our employees, especially instructional staff. Accordingly, we expect employees to attend work as scheduled. Dependability, attendance, punctuality, and a commitment to do the job right are essential at all times.

Should an employee anticipate being absent or late, he or she should call and email his or her direct supervisor. If you are absent from work for longer than one day, you are expected to keep your supervisor informed of your situation. Excessive or unexcused absences or tardiness may result in disciplinary action up to and including termination.

Personal appearance

Employees are expected to wear clothing appropriate for the nature of our organization and the type of work performed. Because each employee is a representative of Invictus Nashville Charter School in the eyes of the public, each employee must report to work properly groomed, wearing appropriate clothing and maintaining a professional appearance. Invictus Nashville Charter School will work to accommodate any religious appearance requirements if doing so will not place an undue burden on Invictus Nashville Charter School.

Invictus Nashville Charter School Leadership may establish specific dress-codes, but the following are generally regarded as inappropriate while school is in session: cut-off shorts, flip flops, revealing clothing, clothing that is too tight or otherwise interferes with students' learning or degrades the image of the school.

If Invictus Nashville Charter School leadership deems an employee's attire unsuitable, he or she may ask the employee to return home and change.

Conflict of interest

All employees must avoid situations involving actual or potential conflict of interest.

An employee involved in any relationships or situations that may constitute a conflict of interest should immediately and fully disclose the relevant circumstances to his or her immediate supervisor for a determination about whether a potential or actual conflict exists. If an actual or potential conflict is determined, Invictus Nashville Charter School may take whatever corrective action appears appropriate according to the circumstances. Failure to disclose facts constitute grounds for disciplinary action.

All employees will avoid any action, whether or not specifically prohibited by this policy, that might result in or create the appearance of using employment with Invictus Nashville Charter School or influence on Invictus Nashville Charter School decision-making for private gain.

The organization recognizes the right of employees to engage in activities outside of their employment that are of a private nature and unrelated to our business. Any outside employment should be promptly disclosed to your immediate supervisor. In certain circumstances, outside employment will be approved, if it does not conflict with Invictus Nashville Charter School's mission or the employee's work at Invictus Nashville Charter School.

Political engagement

Invictus Nashville Charter School is a non-partisan organization. Employees may engage in partisan and election political activities. However, employees must not use their title or employment status with Invictus Nashville Charter School. Only the ED or those approved by the ED may represent Invictus Nashville Charter School in any official capacity during these private activities.

Safety

Invictus Nashville Charter School is committed to providing a safe environment and complying with all workplace safety requirements. Employees are responsible for familiarizing themselves with Invictus Nashville Charter School safety/security rules and practices.

- ◆ Employees should know the location of all alarms and fire extinguishers and the proper procedure for using those tools in the event of an emergency.
- ◆ Employees should ensure the fire evacuation procedure is posted in classrooms/offices and know their role in an emergency evacuation of the building.
- ◆ Employees should properly secure all entrances and equipment upon leaving an Invictus Nashville Charter School facility.

Weapons

Invictus Nashville Charter School prohibits all persons, including employees, who enter Invictus Nashville Charter School property from carrying a handgun, firearm, knife, or other weapon as defined in TCA § 39-17-1309 regardless of whether the person is licensed to carry the weapon or not. This includes "carry" permits. The only exception to this policy will be police officers, security guards, or other persons who have been given written consent by Invictus Nashville Charter School to carry a weapon on Invictus Nashville Charter

School premises as part of their official duties. Employees who violate this policy are subject to disciplinary action and may be referred to the appropriate legal authorities for prosecution.

TECHNOLOGY & MEDIA

Equipment

Invictus Nashville Charter School provides employees access to technology such as computers, phones, email, cameras, and copy machines. Invictus Nashville Charter School property should be primarily used for conducting Invictus Nashville Charter School business. Please treat your Invictus Nashville Charter School issued equipment with the same care and respect that you would treat your own property.

Invictus Nashville Charter School often purchases accidental damage protection and extended warranties for its technology equipment. However, if an employee demonstrates negligence or a consistent track record of damage/loss, Invictus Nashville Charter School may require an employee to replace or furnish his/her own device at his/her own expense.

Appropriate personal use of computers and other systems is permitted, but communications will be treated no different than other business-related information and messages as described below.

Communications

Employees shall not use Invictus Nashville Charter School email addresses to solicit for commercial ventures, religious, or political causes. Additionally, employees may not use the internet or email systems for any disruptive or offensive messages, such as messages that contain sexual implications, racial slurs, gender-specific comments, or any other comments that address a person's age, sexual orientation, religious or political beliefs, national origin, or disability.

The internet may not be used to send (upload) or receive (download) copyrighted materials without authorization.

Invictus Nashville Charter School maintains the right to enter into any company-issued electronic systems, including voicemail, email, text messages, and computer systems, and to inspect and review any data recorded in those systems.

Employees should not assume that information messages or content stored on any Invictus Nashville Charter School device are private or that Invictus Nashville Charter School representatives will not access or review this information. The contents of computers, voicemail, and e-mail may be disclosed as necessary by Invictus Nashville Charter School to satisfy public records requests.

Social Media

Invictus Nashville Charter School respects the right of its employees to express themselves through social media outlets. However, Invictus Nashville Charter School has an interest in protecting its brand and executing a communications strategy.

Postings authorized by Invictus Nashville Charter School : Invictus Nashville Charter School manages several social media accounts for informational and promotional purposes. Only employees authorized by relevant Invictus Nashville Charter School leadership may use social media accounts to conduct official Invictus Nashville Charter School communications. Employees should not post any pictures of students and should refrain from posting any kind of student data/information that is personally identifiable.

Other postings : Employees are encouraged to resolve workplace grievances internally, and should refrain from posting comments and materials that could be viewed as malicious, obscene, threatening, intimidating,

or that could create a hostile environment on the basis of race, sex, disability, religion, or any other status protected by law if they choose to address the grievance using social media.

Employees should refrain from using their position or the nature of business at Invictus Nashville Charter School to engage in online discussions. Employees are prohibited from impersonating Invictus Nashville Charter School, making statements purportedly on its behalf without authorization, or making statements that can be construed as establishing Invictus Nashville Charter School's official position or policy on any particular issue. Where relevant, an employee must include a disclaimer that his/her views and opinions do not necessarily reflect the view of the organization or management.

Employees are further prohibited from disclosing confidential information regarding Invictus Nashville Charter School on social media, or using social media to otherwise violate any terms of this handbook or other agreement the employee has entered into with Invictus Nashville Charter School.

Always remember, posted information is public information.

Interaction with Media

All media inquiries regarding Invictus Nashville Charter School and its operations must be referred to the Executive Director. Only these Invictus Nashville Charter School leaders are authorized to make or approve public statements pertaining to Invictus Nashville Charter School. If you are contacted by the media about a Invictus Nashville Charter School matter, please decline comment unless previously authorized by the ED or his/her designee.

In the interest of protecting the privacy rights of students and parents and preserving the instructional environment of our school, Invictus Nashville Charter School will grant media access to students only upon prior consent from a parent/guardian.

COMPENSATION & BENEFITS

Pay schedule and format

Invictus Nashville Charter School pays its employees on a bi-weekly schedule. Pay stubs include the total number of regular, overtime hours, special pay for non-worked hours, rate of pay, any deductions authorized by you and the deductions required by law (Federal Income Tax, Social Security, and Medicare Tax). To better facilitate timely disbursement, Invictus Nashville Charter School strongly encourages its employees to enroll in direct deposit.

If there is an error on your paycheck please report it to the Director of Operations.

Withholdings

Invictus Nashville Charter School is required by law to make certain deductions from every employee's compensation, including applicable federal, state, and local income taxes. Medicare and Social Security taxes also must be deducted from each employee's earnings. Invictus Nashville Charter School contributes the employer portion of Medicare and Social Security payroll taxes.

The organization offers its employees certain programs and benefits beyond those required by law. Eligible employees may voluntarily authorize deductions from their paychecks to cover the costs of participation in these programs. Contact your supervisor with questions concerning deductions and how they are calculated.

Every deduction from your paycheck is explained on your pay stub. If you do not understand the deductions, ask the Director of Operations to explain them to you.

Federal Withholding Tax deduction is determined by the employee's W-4 form. The W-4 form should be completed upon hire and it is the employee's responsibility to report any changes in filing status to the Director of Operations and to fill out a new W-4 form. At the end of the calendar year, a "withholding statement" (W-2) will be prepared and forwarded to each employee for use in connection with preparation of income tax returns. The W-2 shows Social Security information, taxes withheld and total wages.

Wage Attachments and Garnishments

Under normal circumstances, Invictus Nashville Charter School will not assist creditors in the collection of personal debts from its employees. However, creditors may resort to certain legal procedures such as garnishments or levies that may require Invictus Nashville Charter School, by law, to withhold part of your earnings in their favor

Benefits

Full time Invictus Nashville Charter School employees are eligible for benefits. Benefits are administered through two different organizations based on an employee's classification. Certificated employees (i.e. have an active TN teaching license) receive benefits through the Metropolitan Nashville Public School District. Support employees (i.e. do not have an active TN teaching license) receive benefits through the Metropolitan Nashville Government. The actual Plan documents for any specific benefit will be the final authority and most up to date source of information on benefits provided to Invictus Nashville Charter School employees.

Paid Time Off (PTO): Holidays and Personal Days

The master calendar should be consulted for all federal and Invictus Nashville Charter School-designated holidays. Personal Days are days for personal time which an employee may voluntarily elect to be paid for not attending work as described below. Employees may take Personal Days PTO off for any purpose including rest, relaxation, illness/sickness, or any other personal necessity reason (other than bereavement, jury duty, or maternity/paternity leave which are covered by other policies). Employees will lose and not be paid for any unused PTO at the end of the calendar year.

Prior to requesting time off, a supervisor should be consulted to coordinate personal days in order to minimize multiple staff being out on the same day in a given grade level. Employees are also asked to not use 3 or more personal days consecutively. PTO days cannot be rolled over into the next calendar year.

Bereavement leave

Regular employees are eligible for up to one week of paid bereavement leave to attend the funeral of an “immediate family” member. An “immediate family member” is generally defined as mother, father, spouse, domestic partner, son, daughter, or step-family. An employee should discuss the need for bereavement leave with their manager as soon as practical after the employee learns of the need for the leave.

Worker’s compensation

If you are injured on the job, a portion of your wages may be protected under Invictus Nashville Charter Schools paid worker’s compensation coverage. In addition to continuing your wages for lost time, workers’ compensation coverage may also assume the responsibility of paying medical expenses that are related to the covered injury.

In the event you are hurt on the job, you must immediately report the injury to your school leader, who will help you file a claim and instruct you on the proper procedures to follow. All workers’ compensation claims should be reported immediately. Failure to report an injury promptly may lead to a reduction or denial of workers’ compensation benefits.

Jury duty

Employees who serve on a jury, and provide written documentation, will be paid for the time spent on jury duty at their current rate. Invictus Nashville Charter School requests that its employees stay in close contact with their supervisors to advise them on their status and timeline for a return to work as it relates to jury duty. For the purposes of overtime calculation for hourly employees, time off for jury duty will not count towards actual hours worked.

Time off to Vote

If an employee does not have sufficient time outside of working hours to vote, schedules may be adjusted as needed to ensure that the employee is able to cast a vote in a governmental election. Please notify your supervisor as early as possible if you anticipate the need to adjust your schedule to vote.

Military leave

An employee who is a member of the United States Army, Navy, Air Force, Marines, Coast Guard, National Guard, Reserves or Public Health Service will be granted an unpaid leave of absence for military service,

training or related obligations in accordance with applicable law. Employees on military leave may substitute their accrued paid leave time for unpaid leave.

At the conclusion of the leave, upon the satisfaction of certain conditions, an employee generally has a right to return to the same position he or she held prior to the leave or to a position with seniority, status and pay that the employee is qualified to perform. Contact Invictus Nashville Charter School for additional exclusions and terms as defined by federal and state law requirements.

Personal leave of absence

The provisions and terms of the FMLA will control a requested leave of absence to eligible employees. To the extent that an employee and a requested leave is covered under Tennessee Code Annotated section 4-21-408, the provisions and terms of Tennessee Code Annotated section 4-21-408 will control a requested leave of absence.

If the FMLA does not cover an employee or an employee's requested leave, an employee may nonetheless be granted a leave of absence in situations in which Invictus Nashville Charter School determines that an extended period of time away from the job will be in the best interest of the employee and the Invictus Nashville Charter School.

Requests for a leave of absence or any extension of a leave should be submitted in writing to the employee's supervisor at least thirty days before the beginning of the leave period, or as soon as practicable. The final decision concerning the request will be made by the ED or his or her designee. All employees on approved leave are expected to report any change of status in their need for leave or their intention to return to work to their supervisor as soon as practicable.

Employees on personal leave will be required to use all unused PTO while on leave. Invictus Nashville Charter School will continue health insurance and other benefits to employees on leave for no longer than 12 weeks from the beginning date of leave so long as the employee continues to pay any employee portion of the contribution. Benefits that accrue according to the length of service, such as paid vacation, holiday, personal, and sick days, do not accrue during periods of leave.

Employees returning from a personal leave due to an illness or injury must provide a return-to-work certification from their physician. Any restrictions must be noted on the release.

Employees on an authorized personal leave of absence may not perform work for any other employer, unless approved by Invictus Nashville Charter School prior to leave.

It is possible that an employee returning from a personal leave of absence may not be returned to the same job position he or she held before taking leave. Invictus Nashville Charter School will do its best to return employees to a same or similar position, but it cannot guarantee any positions will be available upon employee's return. If an employee fails to return to work at the conclusion of an approved leave of absence, including any extension of the leave time, the employee will be considered to have voluntarily terminated employment with Invictus Nashville Charter School, unless prohibited by any state or federal law.

Maternity/paternity leave

Invictus Nashville Charter School strives to be a family-friendly work environment and desires to work with faculty members needing maternity and paternity leave to support the addition of a new family member.

- ♦ The primary caregiver is entitled to take up to 16 weeks off for the birth or adoption of a child. Invictus Nashville Charter School will provide payment for 8 weeks plus any unused PTO if requested.

- ◆ The non-primary caregiver may take up to 2 weeks of paid leave after the birth or adoption of a child.
- ◆ Health care benefits will be provided for the entire leave so long as the employee continues to pay any employee portion of the contribution.

PERFORMANCE EVALUATION & REVIEW

General standards of conduct

Invictus Nashville Charter School expects its employees to act in a professional and responsible manner at all times. The following list provides examples of the conduct that Invictus Nashville Charter School will not tolerate and may merit disciplinary action, up to and including termination, even for a first offense. This list is not exclusive or comprehensive and provides examples of conduct that may result in disciplinary action:

- ◆ Insubordination or refusal to follow instructions properly issued by the employee's supervisor regarding the employee's work
- ◆ Violation of safety and security rules
- ◆ The release of confidential documents/information about the organization, its students, or employees
- ◆ Negligence or careless action that endangers the lives or well-being of another person
- ◆ Theft or unauthorized possession of Invictus Nashville Charter School property, the property of an Invictus Nashville Charter School employee, or the property of an Invictus Nashville Charter School student
- ◆ Fighting, any act of violence, or any threat of violence on company property or while performing work for the organization
- ◆ Dishonesty, misrepresentation, or falsification of an employment application or other Invictus Nashville Charter School document
- ◆ Careless work or repeated failure to meet quality standards
- ◆ Harassment of any kind
- ◆ Failure to cooperate in or interfering with an Invictus Nashville Charter School investigation

Employment guidelines

Violations of Invictus Nashville Charter School policy, whether written in the Employee Handbook, written elsewhere, or otherwise transmitted to employees, as well as other unacceptable behavior by employees may lead to disciplinary action, up to and including termination. Possible types of disciplinary action may include: a verbal warning, written warning, suspension, and termination. Management, in its sole discretion, may warn, reassign, suspend, or discharge any employee at will. The guidelines listed above may or may not be used in the order presented, depending on the severity of the action or behavior. Invictus Nashville Charter School reserves the right to skip any step in its disciplinary process, depending on the severity of the offense, at Invictus Nashville Charter School's sole discretion.

Performance improvement may be suggested whenever Invictus Nashville Charter School management believes that an employee's performance is less than satisfactory and can be resolved through adequate counseling. Corrective counseling is at the discretion of Invictus Nashville Charter School. Invictus Nashville Charter School reserves the right to discharge "at will." Even if corrective counseling is implemented, Invictus Nashville Charter School may terminate employment at any step at the discretion of management.

Performance reviews

The Executive Director will be evaluated by the Board of Directors. All other employees will be evaluated by the Executive Director or his or her designee or both. Invictus Nashville Charter School will document and communicate the official written Evaluation to all employees.

Employee records

Employee personnel records are the property of Invictus Nashville Charter School. Please keep your supervisor advised of changes that should be reflected in your personnel file, including change in contact information, marital status, number of dependents, and person(s) to notify in case of emergency. Prompt notification of these changes is essential and will enable Invictus Nashville Charter School to contact you should the change affect your other records.

Invictus Nashville Charter School restricts disclosure of your personnel file to authorized individuals within Invictus Nashville Charter School or other individuals outside of Invictus Nashville Charter School, as required by law or business purposes. Only the ED or his or her designee is authorized to release information about current or former employees. All personnel files are the property of Invictus Nashville Charter School and will be kept confidential to the extent allowed by the law. However, Invictus Nashville Charter School will cooperate with requests from authorized law enforcement or local, state, or federal agencies conducting official investigations or as otherwise legally required.

ACKNOWLEDGMENT OF RECEIPT OF THE EMPLOYEE HANDBOOK

I acknowledge that I have received a copy of Invictus Nashville Charter School Employee Handbook for the 2024-2025 academic year. I have read and understand the contents of this handbook and will act in accord with these policies and procedures as a condition of my employment with Invictus Nashville Charter School. I understand that if I have questions or concerns at any time about the handbook or the Standards of Conduct, I will consult my immediate supervisor. I also acknowledge that the handbook contains an employment-at-will provision that states:

- ◆ Either Invictus Nashville Charter School or I can terminate my employment relationship at any time, with or without cause, and with or without notice;
- ◆ That this employment-at-will relationship is in effect regardless of any other written statements or policies contained in this handbook, in any other Invictus Nashville Charter School documents, or in any verbal statements to the contrary; and
- ◆ I understand that the contents of this employee handbook are simply policies and guidelines, not a contract or implied contract with employees. The contents of the employee handbook may change at any time.

Please read this Handbook and these employee Standards of Conduct carefully to understand these conditions of employment before you sign this document.

Employee Signature

Date

Employee Name (Please Print)

ATTACHMENT J: INSURANCE

**Commercial Insurance Associates, LLC**

January 12th, 2023

To Whom it May Concern:

Please be advised that we certify and confirm that Invictus Nashville will have, at minimum, the following insurance coverage in place prior to opening. Certificates of Insurance will be provided accordingly.

- General Liability/Automobile Liability: Equal to or greater than \$5,000,000. This insurance shall be primary and non-contributory and will name Metropolitan Government/TDOE as an additional insured. The policy will cover contractual liability and will cover vehicles owned, hired and non-owned.
- Professional Liability: Teachers Professional Liability equal to or greater than \$1,000,000
- Directors & Officers Liability: Equal to or greater than \$5,000,000
- Workers Compensation: Statutory coverage including employers liability limits greater than or equal to the state minimum limits of \$100,000
- Property & Boiler & Machinery Coverage: The policy will insure any owned and rented property on a replacement cost basis with no coinsurance penalty provision
- Sexual Abuse: limits greater than or equal to \$1,000,000
- 10 days' notice of cancellation in favor of Metropolitan Government/TDOE will be included

Please let us know if you have further questions or require any additional documentation.

Best Regards,

A handwritten signature in blue ink that reads "Jacqueline LaFont".

Jacqueline LaFont
Principal
615-973-1393
jlafont@com-ins.com

103 Powell Court, Suite 200 | Brentwood, TN 37027
Tel: 615.515.6000 | Fax: 615.515.6001 | Toll: 866.400.0141 | www.com-ins.com

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET



New Charter School Application Budget Template Instructions

Template Tabs

1) Proposed School Information	Enter proposed school name, contact information, and proposed year of opening
2) Student Assumptions	Enter enrollment and key student demographic information assumptions
3) Pre-Opening Budget	Enter budget details and assumptions for 12 month period prior to Year 1
4) Pre-Opening Cash Flow	Enter cash flow details and assumptions for 12 month period prior to Year 1
5) Years 1-5 Staff Assumptions	Enter staffing assumptions; assumptions will drive over tabs
6) Year 1 Budget	Enter budget details and assumptions for Year 1
7) Year 1 Cash Flow	Enter cash flow details and assumptions for Year 1 (July to June 12 month period)
8) Years 2 through 5 Budget	Enter budget details and assumptions for Years 2 through 5
9) Summary	Informational; enter a starting fund balance if applicable

Template Guidance

- Input financial information into light yellow cells
- Input assumption information or notes into light green cells
- Provides additional information or instruction for specific tab or section of tab
- Cells with red comment tag include additional guidance and instruction

Note: This is not a budgeting tool, but rather a standardized format for sharing key budget information for the proposed charter school. You may add additional worksheets to this workbook to otherwise supplement the information being provided on the existing worksheets.

Developed in partnership with



Template Version 12152022

Invictus Nashville
New Charter School Application Budget Template
Proposed School Information



Proposed School Name	Invictus Nashville
Lead Sponsor Name	Dr. Brenda Jones
Lead Sponsor E-mail Address	bjones@fellow.bes.org
Lead Sponsor Phone Number	615.438.0551
CMO/EMO Affiliation	n/a

Proposed Authorizer	MNPS
Proposed Opening Grade Level(s)	K-1
Proposed Final Grade Level(s)	8
Proposed First Year of Operations	2024-25

Anticipated Enrollment	Year 1	Year 2	Year 3	Year 4	Year 5
	144	216	288	360	432

Note: These cells auto-populate after completing Tab 2.

**Invictus Nashville
New Charter School Application Budget Template
Student Assumptions**

Enrollment Assumptions

Year 1	Year 2	Year 3	Year 4	Year 5
2024-25	2025-26	2026-27	2027-28	2028-29

Pre-Kindergarten (Informational Only)

0	0	0	0	0
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Kindergarten

72	72	72	72	72
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1st Grade

72	72	72	72	72
----	----	----	----	----

2nd Grade

0	72	72	72	72
---	----	----	----	----

3rd Grade

0	0	72	72	72
---	---	----	----	----

4th Grade

0	0	0	72	72
---	---	---	----	----

5th Grade

0	0	0	0	72
---	---	---	---	----

6th Grade

0	0	0	0	0
---	---	---	---	---

7th Grade

0	0	0	0	0
---	---	---	---	---

8th Grade

0	0	0	0	0
---	---	---	---	---

9th Grade

0	0	0	0	0
---	---	---	---	---

10th Grade

0	0	0	0	0
---	---	---	---	---

11th Grade

0	0	0	0	0
---	---	---	---	---

12th Grade

0	0	0	0	0
---	---	---	---	---

Total Enrollment (excluding Pre-Kindergarten)	144	216	288	360	432
Change in Net Enrollment	144	72	72	72	72
# of Classes By Grade					
	Year 1	Year 2	Year 3	Year 4	Year 5
Pre-Kindergarten (Informational Only)	0	0	0	0	0
Kindergarten	3	3	3	3	3
1st Grade	3	3	3	3	3
2nd Grade	0	3	3	3	3
3rd Grade	0	0	3	3	3
4th Grade	0	0	0	3	3
5th Grade	0	0	0	0	3
6th Grade	0	0	0	0	0
7th Grade	0	0	0	0	0
8th Grade	0	0	0	0	0
9th Grade	0	0	0	0	0
10th Grade	0	0	0	0	0
11th Grade	0	0	0	0	0
12th Grade	0	0	0	0	0
Total # of Classes	6	9	12	15	18
Change in Net # of Classes	6	3	3	3	3

		Other Key Assumptions Enter Estimated Percentages				
SPED %		11%	12%	13%	14%	15%
SPED Count		16	26	37	50	65
ELL %		18%	18%	18%	18%	18%
ELL Count		26	39	52	65	78
Anticipated Paid %		60%	60%	60%	60%	60%
Anticipated Reduced %		30%	30%	30%	30%	30%
Anticipated Free %		10%	10%	10%	10%	10%
Anticipated Paid Count		87	129	173	216	259
Anticipated Reduced Count		43	65	86	108	130
Anticipated Free Count		14	22	29	36	43
Total Free and Reduced Count		57	87	115	144	173
School Days		180	180	180	180	180
Attendance Rate		95%	95%	95%	95%	95%

**Invictus Nashville
New Charter School
Application Budget Template
Pre-Opening Budget**

Revenue Assumptions

Year 0
2023-24

Federal Revenues	Rate/Assumption	Amount	Assumption Notes
CSP Startup Grant			Invictus Nashville will apply for the CSP grant

Fundraising & Philanthropy		Detail any private funding sources	
BES Grant	\$125,000	\$125,000	Build, Excel, Sustain Fellowship grant
CSGF	\$400,000	\$400,000	Charter School Growth Fund grant
NSVF	\$215,000	\$215,000	New School Venture Fund grant
Board Fundraising	\$150,000	\$150,000	Board will fundraise \$25K/classroom + \$75K for general operating expenses
Other			

Total Revenues	890,000
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Additional Space to Provide Fundraising Details

Compensation Assumptions

Year 0
2023-24

Administrative Staff	FTE Count	Assumption Notes	
Principal/School Leader	0.92	\$115,500	Executive Director – August 2023 start date
Assistant Principal	0.50	\$40,000	Assistant Director- January 2024 start date
Special Education Coordinator	0.00	\$0	
Deans, Directors	0.00	\$0	
Other (Specify in Assumptions)	0.00	\$0	
Total Administrative Compensation	1.42	155,500	
Instructional Staff			
Teachers	0.00	\$0	
Special Education Teachers	0.00	\$0	
Educational Assistants/Aides	0.00	\$0	
Elective Teachers	0.00	\$0	
Other (Specify in Assumptions)	0.00	\$0	
Total Instructional Compensation	0.00	-	
Non-Instructional Staff			
Clerical Staff	0.00	\$0	

Custodial Staff	0.00	\$0	
Operations	0.50	\$40,000	Director of Operations- January 2024 start date
Social Workers/Counseling	0.00	\$0	
Other (Specify in Assumptions)	0.00	\$0	
Total Non-Instructional Compensation	0.50	40,000	
Bonus		-	
Other Non FTE Compensation		-	
Other Non FTE Compensation		-	
Other Non FTE Compensation		-	
Total FTE Count	1.92		
Total Compensation		195,500	

Employer Benefits & Tax Assumptions

Year 0
2023-24

	Base Assumption		Assumption Notes
Social Security	6.20%	\$12,121	6.2% of total compensation
Medicare	1.45%	\$2,835	1.45% of total compensation
State Unemployment	\$400 per employee	\$767	\$400/full-time employee
Disability/Life Insurance	0.10%	\$196	.1% of total compensation
Workers Compensation Insurance	0.25%	\$489	.25% of total compensation

Other Fringe Benefits			
Medical Insurance	\$6,500	\$12,458	\$6500K/full-time employee
Dental Insurance	\$300	\$575	\$300/full-time employee
Vision Insurance	\$75	\$144	\$75/full-time employee
Other Retirement			
Total Employer Benefits & Taxes		29,584	

Operating Expenses

Year 0
2023-24

Contracted Services		Assumption Notes	
Professional Development	\$5,000	\$5,000	Assumes \$5K for PD for ED, Asst Dir and Dir of Ops
Financial Services	\$2,000	\$6,000	Assumes \$2K/mo Apr - June for back-office services (AP, payroll, accounting, financial reporting, budgeting, etc.)
Audit Services	\$0	\$0	
Legal Fees	\$5,000	\$5,000	Assumes \$5K for potential legal fees
Copier Lease and Usage	\$0	\$0	
Internet and Phone Service	\$750	\$750	Assumes \$750/mo in Jun for phone/internet bundle services + website fees
Student Meals	\$0	\$0	
Payroll Services	\$7,100	\$7,200	Assumes \$6K set-up fee + \$100/mo processing fee
Health Services	\$0	\$0	
Transportation	\$0	\$0	
IT Services	\$0	\$0	
Contracted SPED Services	\$0	\$0	
Insurance	\$3,000	\$3,000	Assumes \$3K annually for D and O liability insurance
Postal Charges	\$0	\$0	

Bank Charges	\$500	\$500	Assumes \$500 annually for account fees
Supplies & Materials			
Curriculum and Instructional Supplies	\$18,750	\$168,750	Assumes \$18,750K/classroom for curriculum, manipulatives, etc. for Y1 and Y2
SIS/Data Support	\$0	\$0	
Student Supplies	\$0	\$0	
Faculty Supplies	\$0	\$0	
Library Books	\$0	\$0	
Testing & Evaluation	\$0	\$0	
Student Laptops	\$8,000	\$16,000	Assumes \$8K/laptop cart, 30 laptops/cart, 1 cart/3 classrooms
Faculty Laptops	\$1,000	\$19,000	Assumes \$1K/computer for Y1 staff
Office Supplies	\$1,000	\$1,000	Assumes \$1K for staplers, pens, paper, etc.
Printing Paper	\$0	\$0	
Field Trips	\$0	\$0	
Student Uniforms	\$0	\$0	
Gifts & Awards - Students	\$0	\$0	
Gifts & Awards - Teachers and Staff	\$0	\$0	
Health Supplies	\$0	\$0	
Facility Related Expenses			
Rent	\$15	\$22,500	\$15/18,000 sqft for June only
Utilities	\$2	\$3,000	Assumes \$2/ sqft for June only
Custodial	\$1	\$1,500	Assumes \$1/ sqft for June only
Waste	\$200	\$200	Assumes \$200/mo for June only
Faculty Furniture	\$15,000	\$15,000	Assumes \$15K for office furniture; classroom furniture included above
Classroom Furniture (staff and student)	\$6,250	\$56,250	Assumes \$6,250/classroom for staff and student furniture for Y1 and Y2
Internet/Network Equipment	\$20,000	\$20,000	Assumes \$20K for internet infrastructure set-up and install
Other Equipment	\$0	\$0	
Building Decorum	\$2,000	\$2,000	Assumes \$2K for signage, etc.

Tenant Improvements	\$200,000	\$200,000	Assumes \$200K for tenant improvements to convert space to school for year 1 and 2.
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other Charges			
Staff Recruitment	\$5,000	\$5,000	Assumes \$5K annually for postings, fairs, travel, stipends to recruit specific certified staff
Student Recruitment & Community Engagement	\$5,000	\$5,000	Assumes \$5K annually for mailers, ads, referral incentives, etc.
Parent & Staff Meetings	\$1,500	\$1,500	Assumes \$1.5K annually for supplies for parent and staff meetings
Authorizer Fee	\$2,500	\$2,500	Assumes \$2.5K for application fee
Background checks	\$40	\$120	Assumes \$40/new employee for background checks
Debt Service			
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Total Operating Expenses		566,670	
Total Expenses		791,154	

Invictus Nashville
New Charter School Application Budget Template
Pre-Opening Cash Flow

Cash Flow Summary

Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0
2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24
Total Budget	July	August	Sept	October	Nov	Dec	January	Feb	March	April	May	June	Total	AR/AP

Beginning Cash

-	-		328,550	315,640	542,730	529,820	541,911	710,808	704,786	673,763	65,241	631,719		
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Revenues

Federal Revenues

-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
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Fundraising & Philanthropy

890,000		350,000	-	240,000	-	25,000	200,000	25,000	-	25,000	-	25,000	890,000	-
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Total Revenues

890,000		350,000	-	240,000	-	25,000	200,000	25,000	-	25,000	-	25,000	890,000	-
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Expenses

Staffing

195,500		10,500	10,500	10,500	10,500	10,500	23,833	23,833	23,833	23,833	23,833	23,833	195,500	-
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Employer Benefits & Taxes

29,584		1,446	1,446	11,446	1,321	1,321	3,725	3,725	3,725	3,350	3,350	3,725	29,584	-
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Contracted Services

27,350		6,873	873	873	873	873	1,706	1,706	1,706	3,706	3,706	4,456	27,450	-
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Supplies & Materials

204,750		91	91	91	91	91	91	91	91	91	91	203,841	204,750	-
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Facility-Related Expenses

320,450	-	-	-	-	-	-	-	-	-	-	-	320,450	320,450	-
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Other Charges

14,120		2,540	-	-	-	-	1,747	1,667	1,667	2,167	2,167	2,167	14,120	-
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Debt Service

-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
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Total Expenses	791,154	21,540	12,910	12,910	12,910	12,910	31,102	31,022	31,022	33,522	33,522	558,472	791,754	-
Operating Income (Loss)	98,246	328,550	(12,910)	27,090	(12,910)	12,090	168,898	(6,022)	(31,022)	(8,522)	(33,522)	(533,472)	98,246	-
Changes in Accounts Receivable		-	-	-	-	-	-	-	-	-	-	-	-	-
Changes in Accounts Payable		-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Proceeds		-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Repayments		-	-	-	-	-	-	-	-	-	-	-	-	-
Other Balance Sheet Activity		-	-	-	-	-	-	-	-	-	-	-	-	-
Ending Cash		328,550	315,640	542,730	529,820	41,911	710,808	704,786	673,763	665,241	631,719	98,246		

Details of Cash Flow

Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0
2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP

Revenues

Assumption Notes

Federal Revenues

CSP Startup Grant	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
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Fundraising & Philanthropy

BES Grant	125,000	\$0	\$125,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	125,000	-	Aug
CSGF	400,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0	400,000	-	Aug and Jan
NSVF	215,000	\$0	\$0	\$0	\$215,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	215,000	-	Oct

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET

Board Fundraising	150,000	\$0	\$25,000	\$0	\$25,000	\$0	\$25,000	\$0	\$25,000	\$0	\$25,000	\$0	\$25,000	150,000	-	Every other month
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Revenues	890,000		350,000	-	240,000	-	25,000	200,000	25,000	-	25,000	-	25,000	890,000	-	

Compensation

Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0
2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24
Total Budget	July	August	Sept	October	Nov	Dec	January	Feb	March	April	May	June	Total	AR/AP

Compensation

Assumption Notes

Principal/School Leader	115,500	\$0	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	115,500	-	Monthly starting in Aug
Assistant Principal	40,000	\$0	\$0	\$0	\$0	\$0	\$0	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	40,000	-	Jan - Jun
Special Education Coordinator	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Deans, Directors	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other (Specify in Assumptions)	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Administrative Compensation	166,000		10,500	10,500	10,500	10,500	10,500	17,167	17,167	17,167	17,167	17,167	17,167	155,500	-	

Instructional Staff

Teachers	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Special Education Teachers	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Educational Assistants/Aides	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Elective Teachers	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other (Specify in Assumptions)	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Instructional Compensation	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Non-Instructional Staff

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET

Clerical Staff	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Custodial Staff	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Operations	40,000	\$0	\$0	\$0	\$0	\$0	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	40,000	-	Jan-Jun
Social Workers/Counseling	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other (Specify in Assumptions)	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Non-Instructional Compensation	40,000	-	-	-	-	-	6,667	6,667	6,667	6,667	6,667	6,667	6,667	40,000	-	

Bonus	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other Non FTE Compensation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other Non FTE Compensation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other Non FTE Compensation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	

Total Compensation	195,500		10,500	10,500	10,500	10,500	10,500	23,833	23,833	23,833	23,833	23,833	23,833	195,500	-	
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Employer Benefits & Taxes

Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0
2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24
Total Budget	July	August	Sept	October	Nov	Dec	January	Feb	March	April	May	June	Total	AR/AP

Assumption Notes

Social Security	12,121	\$0	\$651	\$651	\$651	\$651	\$651	\$1,478	\$1,478	\$1,478	\$1,478	\$1,478	\$1,478	12,121	-	Based on employee start dates
Medicare	2,835	\$0	\$152	\$152	\$152	\$152	\$152	\$346	\$346	\$346	\$346	\$346	\$346	2,835	-	Based on employee start dates
State Unemployment	767	\$0	\$33	\$33	\$33	\$33	\$33	\$100	\$100	\$100	\$100	\$100	\$100	767	-	Based on employee start dates
Disability/Life Insurance	196	\$0	\$11	\$11	\$11	\$11	\$11	\$24	\$24	\$24	\$24	\$24	\$24	196	-	Based on employee start dates
Workers Compensation Insurance	489	\$0	\$26	\$26	\$26	\$26	\$26	\$60	\$60	\$60	\$60	\$60	\$60	489	-	Based on employee start dates
Other Fringe Benefits	-													-	-	
Medical Insurance	12,458	\$0	\$542	\$542	\$542	\$542	\$542	\$1,250	\$1,625	\$1,625	\$1,625	\$1,625	\$1,625	12,458	-	Based on employee start dates
Dental Insurance	575	\$0	\$25	\$25	\$25	\$25	\$25	\$75	\$75	\$75	\$75	\$75	\$75	575	-	Based on employee start dates

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET

Vision Insurance	144	\$0	\$6	\$6	\$6	\$6	\$6	\$19	\$19	\$19	\$19	\$19	\$19	144	-	Based on employee start dates
Other Retirement	-													-	-	
Total Employer Benefits & Taxes	29,584		1,446	1,446	1,446	1,446	1,446	3,350	3,725	3,725	3,725	3,725	3,725	29,584	-	

Operating Expenses

Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0	Year 0
2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24	2023-24
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP

Contracted Services

Assumption Notes

Professional Development	5,000							\$833	\$833	\$833	\$833	\$833	\$833	5,000	-	Jan - Jun
Financial Services	6,000										\$2,000	\$2,000	\$2,000	6,000	-	Apr- Jun
Audit Services	-													-	-	
Legal Fees	5,000	\$0	\$455	\$455	\$455	\$455	\$455	\$455	\$455	\$455	\$455	\$455	\$455	5,000	-	Monthly starting in Aug
Copier Lease and Usage	-													-	-	
Internet and Phone Service	750											\$750		750	-	Jun
Student Meals	-													-	-	
Payroll Services	7,100	\$0	\$6,100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	7,100	-	Set-up cost in Aug monthly for processing
Health Services	-													-	-	
Transportation	-													-	-	
IT Services	-													-	-	
Contracted SPED Services	-													-	-	
Insurance	3,000	\$0	\$273	\$273	\$273	\$273	\$273	\$273	\$273	\$273	\$273	\$273	\$273	3,000	-	Monthly starting in Aug
Postal Charges	-													-	-	
Bank Charges	500	\$0	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	500	-	Monthly starting in Aug.

Supplies & Materials

Curriculum and Instructional Supplies	168,750	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$168,750	168,750	-	Jun
SIS/Data Support	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Student Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Faculty Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Library Books	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Testing & Evaluation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Student Laptops	16,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$16,000	16,000	-	Jun
Faculty Laptops	19,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$19,000	19,000	-	Jun
Office Supplies	1,000	\$0	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	\$91	1,000	-	Monthly starting in Aug
Printing Paper	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Field Trips	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Student Uniforms	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Gifts & Awards - Students	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Gifts & Awards - Teachers and Staff	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Health Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	

Facility Related Expenses

Rent	22,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$22,500	22,500	-	Jun
Utilities	3,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,000	3,000	-	Jun
Custodial	1,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,500	1,500	-	Jun
Waste	200	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$200	200	-	Jun
Faculty Furniture	15,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$15,000	15,000	-	Jun
Classroom Furniture (staff and student)	56,250	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$56,250	56,250	-	Jun
Internet/Network Equipment	20,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$20,000	20,000	-	Jun
Other Equipment	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Building Decorum	2,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,000	2,000	-	Jun
Tenant Improvements	200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$200,000	200,000	-	Jun
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	

Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	

Other Charges

Staff Recruitment	5,000	\$0	\$0	\$0	\$0	\$0	\$0	\$833	\$833	\$833	\$833	\$833	\$833	5,000	-	Jan - Jun
Student Recruitment & Community Engagement	5,000	\$0	\$0	\$0	\$0	\$0	\$0	\$833	\$833	\$833	\$833	\$833	\$833	5,000	-	Jan - Jun
Parent & Staff Meetings	1,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$500	\$500	\$500	1,500	-	Apr - Jun
Authorizer Fee	2,500	\$0	\$2,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	2,500	-	Aug
Background checks	120	\$0	\$40	\$0	\$0	\$0	\$0	\$80	\$0	\$0	\$0	\$0	\$0	120	-	Aug

Debt Service

Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Total Operating Expenses	566,670		9,504	964	964	964	964	3,544	3,464	3,464	5,964	5,964	530,914	566,670	-	
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Total Expenses	791,754		21,450	12,910	12,910	12,910	12,910	31,102	31,022	31,022	33,522	33,522	558,472	791,754	-	
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Invictus Nashville
New Charter School Application Budget Template

Year 1-5 Staff Assumptions

FTE Assumptions

	Year 1	Year 2	Year 3	Year 4	Year 5
Fiscal Year	2024-25	2025-26	2026-27	2027-28	2028-29
Enrollment	144	216	288	360	432
# of Classes	6	9	12	15	18

Administrative Staff

Principal/School Leader	1.00	1.00	1.00	1.00	1.00
Assistant Principal	1.00	1.00	1.00	1.00	2.00
Special Education Coordinator	0.00	0.00	1.00	1.00	1.00
Deans, Directors	0.00	0.00	1.00	1.00	2.00
Other (Specify in Assumptions)	0.00	0.00	1.00	1.00	1.00
Total Administrative FTE	2.00	2.00	5.00	5.00	7.00

Instructional Staff

Teachers	6.00	9.00	12.00	15.00	18.00
Special Education Teachers	1.00	1.00	2.00	2.00	3.00
Educational Assistants/Aides	6.00	9.00	12.00	15.00	18.00
Elective Teachers	2.00	3.00	3.00	5.00	5.00
Other (Specify in Assumptions)	0.00	1.00	1.00	1.00	2.00
Total Instructional FTE	15.00	23.00	30.00	38.00	46.00

Non-Instructional Staff

Clerical Staff	1.00	1.00	1.00	1.00	1.00
Custodial Staff	0.00	0.00	0.00	0.00	0.00
Operations	1.00	1.00	1.00	1.00	1.00
Social Workers/Counseling	0.00	0.00	0.00	0.00	0.00
Other (Specify in Assumptions)	0.00	0.00	0.00	0.00	0.00
Total Non-Instructional FTE	2.00	2.00	2.00	2.00	2.00
Total FTE	19.00	27.00	37.00	45.00	55.00

Compensation Assumptions

Year 1	Year 2	Year 3	Year 4	Year 5
2024-25	2025-26	2026-27	2027-28	2028-29

Annual Increase	0.00%	1.50%	1.50%	1.50%	1.50%
Cumulative Increase	100.00%	101.50%	103.02%	104.57%	106.14%

Administrative Staff

Base Assumption

Principal/School Leader	\$126,000	126,000	127,890	129,808	131,755	133,732
Assistant Principal	\$80,000	80,000	81,200	82,418	83,654	169,818
Special Education Coordinator	\$70,000	-	-	72,116	73,197	74,295
Deans, Directors	\$65,000	-	-	66,965	67,969	137,977
Other (Specify in Assumptions)	\$70,000	-	-	72,116	73,197	74,295
Total Administrative Compensation	206,000	206,000	209,090	423,422	429,774	590,118

Assumption Notes

Executive Director
Assistant Director(s)
Director of Students Supports
Dean(s)
Director of Community Outreach & Partnerships

Instructional Staff

Teachers	\$55,000	330,000	502,425	679,949	862,685	1,050,750
Special Education Teachers	\$55,000	55,000	55,825	113,325	115,025	175,125

Lead Classroom Teachers
SPED Teachers

Educational Assistants/Aides	\$42,000	252,000	383,670	519,233	658,777	802,391	Assistant Teachers
Elective Teachers	\$55,000	110,000	167,475	169,987	287,562	291,875	Related Arts Teachers
Other (Specify in Assumptions)	\$42,000	-	42,630	43,269	43,918	89,155	Paraprofessionals
Total Instructional Compensation		747,000	1,152,025	1,525,763	1,967,967	2,409,295	
Non-Instructional Staff							
Clerical Staff	\$48,000	48,000	48,720	49,451	50,193	50,945	Office Manager
Custodial Staff	\$0	-	-	-	-	-	
Operations	\$80,000	80,000	81,200	82,418	83,654	84,909	Director of Operations
Social Workers/Counseling	\$0	-	-	-	-	-	
Other (Specify in Assumptions)	\$0	-	-	-	-	-	
Total Non-Instructional Compensation		128,000	129,920	131,869	133,847	135,855	
Other Compensation		-	-	-	-	-	
Other Compensation		-	-	-	-	-	
Other Compensation		-	-	-	-	-	
Other Compensation		-	-	-	-	-	
Total Compensation		1,081,000	1,491,035	2,081,055	2,531,587	3,135,268	

Employer Benefits & Tax Assumptions

		Year 1	Year 2	Year 3	Year 4	Year 5	
		2024-25	2025-26	2026-27	2027-28	2028-29	
Social Security	Base Assumption 6.20%	\$67,022	\$92,444	\$129,025	\$156,958	\$194,387	Assumption Notes Assumes 6.2% of all wages
Medicare	1.45%	\$15,675	\$21,620	\$30,175	\$36,708	\$45,461	Assumes 1.45% of all wages

State Unemployment	\$400 per employee	\$7,600	\$10,800	\$14,800	\$18,000	\$22,000	Assumes \$400/employee
Disability/Life Insurance	0.10%	\$1,081	\$1,491	\$2,081	\$2,532	\$3,135	Assumes .1% of all wages
Workers Compensation Insurance	1.80%	\$19,458	\$26,839	\$37,459	\$45,569	\$56,435	Assumes 1.8% of all wages
Other Fringe Benefits	0.00%	\$0	\$0	\$0	\$0	\$0	
	Health Insurance Annual Increase	5.00%	5.00%	5.00%	5.00%	5.00%	
	Cumulative Increase	105.00%	110.25%	115.76%	121.55%	127.63%	
Medical Insurance	\$6,500	\$123,500	\$175,500	\$240,500	\$292,500	\$357,500	Assumes \$6500/employee annually
Dental Insurance	\$300	\$5,700	\$8,100	\$11,100	\$13,500	\$16,500	Assumes \$300/employee annually
Vision Insurance	\$75	\$1,425	\$2,025	\$2,775	\$3,375	\$4,125	Assumes \$75/employee annually
TCRS Certified Legacy	8.69%	\$14,091	\$19,436	\$27,127	\$32,999	\$40,868	TCRS Legacy- assumes 15% of staff
TCRS Certified Hybrid	9.00%	\$34,052	\$46,968	\$65,553	\$79,745	\$98,761	TCRS Hybrid- assumes 35% of staff
TCRS Classified Legacy	0.00%	\$0	\$0	\$0	\$0	\$0	
TCRS Classified Hybrid	0.00%	\$0	\$0	\$0	\$0	\$0	
Other Classified Retirement	12.46%	\$67,319	\$92,854	\$129,598	\$157,655	\$195,249	Metro Support- assumes 50% of staff
Other Retirement	0.00%	\$0	\$0	\$0	\$0	\$0	

Invictus Nashville
 New Charter School Application Budget
 Template
 Year 1 Budget

Revenue Assumptions

	Year 1
	2024-25
Annual Revenue Increase	0.00%
Cumulative Increase	100.00%

State Revenues	Rate/Assumption		Assumption Notes
TISA Base Rate	\$6,860	\$987,840	See TISA calculator
TISA Weights	See Tracker	\$313,571	See TISA calculator
TISA Direct	See Tracker	\$111,514	See TISA calculator
TISA Local Extra	\$4,200	\$604,800	70% of current projected local extra rate for FY24
Other			
Federal Revenues		\$0	
Title I	\$500	\$72,000	Assumes \$500/student
Title II	\$50	\$7,200	Assumes \$50/student
Title III	\$0	\$0	
NSLP	\$630	\$90,720	Assumes \$3.50/day reimbursement for lunch
E-Rate	\$20,000	\$20,000	Assumes \$20K annually

CSP Startup Grant	\$0	\$0	
IDEA	\$500	\$8,000	Assumes \$500/SPED student
NSLP - Breakfast	\$360	\$51,840	Assumes \$2/day reimbursement for breakfast

School Activity Revenues

Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	

Fundraising & Philanthropy

BES Grant	\$0	\$0	
CSGF	\$0	\$0	
NSVF	\$0	\$0	
Board Fundraising	\$150,000	\$150,000	Board will fundraising \$25K/classroom + \$75K general operating
Other	\$0	\$0	

Total Revenues

2,417,484

Compensation

Year 1

2024-25

Administrative Staff	FTE Count	Assumption Notes
Principal/School Leader	1.00	126,000 Executive Director
Assistant Principal	1.00	80,000 Assistant Director(s)

Special Education Coordinator	0.00	-	
Deans, Directors	0.00	-	
Other (Specify in Assumptions)	0.00	-	
Total Administrative Compensation	2.00	206,000	
Instructional Staff			
Teachers	6.00	330,000	Lead Classroom Teachers
Special Education Teachers	1.00	55,000	SPED Teachers
Educational Assistants/Aides	6.00	252,000	Assistant Teachers
Elective Teachers	2.00	110,000	Related Arts Teachers
Other (Specify in Assumptions)	0.00	-	
Total Instructional Compensation	15.00	747,000	
Non-Instructional Staff			
Clerical Staff	1.00	48,000	Office Manager
Custodial Staff	0.00	-	
Operations	1.00	80,000	Director of Operations
Social Workers/Counseling	0.00	-	
Other (Specify in Assumptions)	0.00	-	
Total Non-Instructional Compensation	2.00	128,000	
Other Compensation		-	
Other Compensation		-	
Other Compensation		-	
Other Compensation		-	
Total Compensation		1,081,000	

Employer Benefits & Taxes

Year 1
2024-25

Assumption Notes

Social Security	67,022	Assumes 6.2% of all wages
Medicare	15,675	Assumes 1.45% of all wages
State Unemployment	7,600	Assumes \$400/employee
Disability/Life Insurance	1,081	Assumes .1% of all wages
Workers Compensation Insurance	19,458	Assumes 1.8% of all wages
Other Fringe Benefits	-	
Medical Insurance	123,500	Assumes \$6500/employee annually
Dental Insurance	5,700	Assumes \$300/employee annually
Vision Insurance	1,425	Assumes \$75/employee annually
TCRS Certified Legacy	14,091	TCRS Legacy- assumes 10% of staff
TCRS Certified Hybrid	34,052	TCRS Hybrid- assumes 30% of staff
TCRS Classified Legacy	-	
TCRS Classified Hybrid	-	
Other Classified Retirement	67,319	Metro Support- assumes 50% of staff
Other Retirement	-	

Total Employer Benefits & Taxes	356,922
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Operating Expenses

Year 1

	2024-25		
Contracted Services			Assumption Notes
Professional Development	\$10,000	\$30,000	Assumes 1/2 of lead teachers need Montessori training
Financial Services	\$65,000	\$65,000	Assumes \$65K annually for back-office services (AP, payroll, accounting, financial reporting, budgeting, etc.)
Audit Services	\$2,000	\$2,000	Assumes \$2K for 990
Legal Fees	\$5,000	\$5,000	Assumes \$5K/year for legal retainer
Copier Lease and Usage	\$750	\$9,000	Assumes \$750/mo for 1 copier
Internet and Phone Service	\$1,300	\$15,600	Assumes \$1300/mo for internet fees
Student Meals	\$990	\$178,200	Assumes \$5.50/day for breakfast and lunch
Payroll Services	\$400	\$4,800	Assumes \$400/mo for payroll processing fees
Health Services	\$1,500	\$15,000	Assumes \$1500/mo Aug- May
Transportation	\$125,000	\$125,000	Assumes \$75K/bus 50% participation, 72 students/bus;\$50K additional for students with disabilities.
IT Services	\$14,500	\$14,500	Assumes \$9K annually for tech support, computer repairs and \$5.5k annually for erate consultant
Contracted SPED Services	\$1,000	\$16,000	Assumes \$1K/SPED student
Insurance	\$30,000	\$30,000	Assumes \$30K annually for D and O liability insurance
Postal Charges	\$5	\$720	Assumes \$5/student
Bank Charges	\$1,000	\$1,000	Assumes \$1K annually
Supplies & Materials			
Curriculum and Instructional Supplies	\$0	\$0	Purchased in YO
SIS/Data Support	\$7,500	\$7,500	Assumes \$5K for enrollment software and \$2.5K for SIS annually
Student Supplies	\$35	\$5,040	Assumes \$35/student for consumable materials
Faculty Supplies	\$250	\$4,750	Assumes \$250/FTE
Library Books	\$30	\$4,320	Assumes \$30/student for classroom libraries
Testing & Evaluation	\$100	\$14,400	Assumes \$100/student for MAP, Aimsweb, Dibels, and Transparent Classroom
Student Laptops	\$8,000	\$8,000	Assumes \$8K/laptop cart, 30 laptops/cart, 1 cart/3 classrooms
Faculty Laptops	\$1,000	\$8,000	Assumes \$1K/laptop for Y2 staff
Office Supplies	\$500	\$6,000	Assumes \$500/mo

Printing Paper	\$10	\$1,440	Assumes \$10/student
Field Trips	\$3,000	\$6,000	Assumes \$3,000/grade level
Student Uniforms	\$0	\$0	
Gifts & Awards - Students	\$10	\$1,440	Assumes \$10/student for incentives and recognition awards
Gifts & Awards - Teachers and Staff	\$100	\$1,900	Assumes \$100/FTE for staff appreciation, etc
Health Supplies	\$5	\$720	Assumes \$5/student

Facility Related Expenses

Rent	\$15	\$270,000	Assumes \$15/sqft for 18,000 sqft
Utilities	\$2	\$36,000	Assumes \$2/sqft for 18,000 sqft
Custodial	\$1	\$18,000	Assumes \$1/sqft for 18,000 sqft
Waste	\$200	\$2,400	Assumes \$200/mo
Faculty Furniture	\$0	\$0	Purchased in Y0
Classroom Furniture (staff and student)	\$0	\$0	Purchased in Y0
Internet/Network Equipment	\$2,500	\$2,500	Assumes \$2500 annually for upgrades and repairs
Other Equipment	\$0	\$0	
Building Decorum	\$2,000	\$2,000	Assumes \$2K annually for signage
Tenant Improvements	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	

Other Charges

Staff Recruitment	\$5,000	\$5,000	Assumes \$5K annually for postings, fairs, travel, stipends to recruit specific certified staff
Student Recruitment & Community Engagement	\$5,000	\$5,000	Assumes \$5K annually for mailers, ads, referral incentives, etc.
Parent & Staff Meetings	\$1,500	\$1,500	Assumes \$1,500 annually for supplies for parent and staff meetings

Authorizer Fee	\$35,000	\$35,000	Assumes \$35K max authorizer fee
Background checks	\$40	\$640	Assumes \$40/new employee for background checks
Debt Service			
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Total Operating Expenses		959,370	
Total Expenses		2,397,292	

Invictus Nashville
New Charter School Application Budget Template
Year 1 Cash Flow

Cash Flow Summary

	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1
	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25
	Total Budget	July	August	Sept	October	Nov	Dec	January	Feb	March	April	May	June	Total
Beginning Cash	98,246	98,246	32,297	29,542	29,607	13,672	42,957	70,742	152,027	163,812	191,598	220,883	48,395	
Revenues														
State Revenues	2,017,724	-	201,772	201,772	201,772	201,772	201,772	201,772	201,772	201,772	201,772	-	201,772	2,017,724
Federal Revenues	249,760	-	-	-	-	27,720	27,720	31,720	27,720	27,720	27,720	27,720	51,720	249,760
School Activity Revenues	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising & Philanthropy	150,000	100,000	-	-	-	-	-	50,000	-	-	-	-	-	150,000
Total Revenues	2,417,484	100,000	201,772	201,772	201,772	229,492	229,492	283,492	229,492	229,492	229,492	27,720	253,492	2,417,484
Expenses														
Staffing	1,081,000													
Employer Benefits & Taxes	356,922	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	1,081,000
Contracted Services	511,820	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	356,922
Supplies & Materials	69,510	14,635	48,055	48,055	48,055	48,055	48,055	50,055	48,055	48,055	43,055	48,055	14,635	511,820
Facility-Related Expenses	330,900	8,059	5,239	5,239	3,739	3,739	5,239	3,739	3,739	5,239	3,739	3,739	20,401	69,510
Other Charges	47,140	27,575	27,575	27,575	27,575	27,575	27,575	27,575	27,575	27,575	27,575	27,575	27,575	330,900
	47,140	1,012	1,012	1,012	18,512	1,012	1,012	1,012	18,512	1,012	1,012	1,012	1,012	47,140

Debt Service	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Expenses	2,397,792	165,949	204,527	201,707	217,707	200,207	201,707	202,207	217,707	201,707	200,207	200,207	183,449	2,397,292	-
Operating Income (Loss)	20,192	(65,949)	(2,755)	65	(15,935)	29,285	27,785	81,285	11,785	27,785	29,285	(172,487)	70,043	20,192	-

Changes in Accounts Receivable	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Changes in Accounts Payable	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Proceeds	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Repayments	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Balance Sheet Activity	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Ending Cash	32,297	29,542	29,607	13,672	42,957	70,742	152,027	163,812	191,598	220,883	48,395	118,438
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Details of Cash Flow

Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1
2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25
Total Budget	July	August	Sept	Oct	Nov	Dec	January	Feb	March	April	May	June	Total	AR/AP

Revenues

Assumption Notes

State Revenues

Assumption Notes

TISA Base Rate	987,840	\$0	\$98,784	\$98,784	\$98,784	\$98,784	\$98,784	\$98,784	\$98,784	\$98,784	\$98,784	\$0	\$98,784	987,840	-	Aug - Apr; Jun
TISA Weights	313,571	\$0	\$31,357	\$31,357	\$31,357	\$31,357	\$31,357	\$31,357	\$31,357	\$31,357	\$31,357	\$0	\$31,357	313,571	-	Aug - Apr; Jun
TISA Direct	111,514	\$0	\$11,151	\$11,151	\$11,151	\$11,151	\$11,151	\$11,151	\$11,151	\$11,151	\$11,151	\$0	\$11,151	111,514	-	Aug - Apr; Jun
TISA Local Extra	604,800	\$0	\$60,480	\$60,480	\$60,480	\$60,480	\$60,480	\$60,480	\$60,480	\$60,480	\$60,480	\$0	\$60,480	604,800	-	Aug - Apr; Jun

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET

Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Federal Revenues																
Title I	72,000	\$0	\$0	\$0	\$0	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	\$9,000	72,000	-	Nov - Jun
Title II	7,200	\$0	\$0	\$0	\$0	\$900	\$900	\$900	\$900	\$900	\$900	\$900	\$900	7,200	-	Nov - Jun
Title III	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
NSLP	90,720	\$0	\$0	\$0	\$0	\$11,340	\$11,340	\$11,340	\$11,340	\$11,340	\$11,340	\$11,340	\$11,340	90,720	-	Nov - Jun
E-Rate	20,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$20,000	20,000	-	Jul
CSP Startup Grant	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
IDEA	8,000	\$0	\$0	\$0	\$0	\$0	\$0	\$4,000	\$0	\$0	\$0	\$0	\$4,000	8,000	-	
NSLP - Breakfast	51,840	\$0	\$0	\$0	\$0	\$6,480	\$6,480	\$6,480	\$6,480	\$6,480	\$6,480	\$6,480	\$6,480	51,840	-	Nov - Jun
School Activity Revenues																
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Fundraising & Philanthropy																
BES Grant	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
CSGF	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
NSVF	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Board Fundraising	150,000	\$100,000	\$0	\$0	\$0	\$0	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0	150,000	-	Jul and Jan
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Revenues	2,417,484	100,000	201,772	201,772	201,772	229,492	229,492	283,492	229,492	229,492	229,492	27,720	253,492	2,417,484	-	

Compensation

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET

Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1
2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25
Total Budget	July	August	Sept	Oct	Nov	Dec	January	Feb	March	April	May	June	Total	AR/AP

Compensation

Assumption Notes

Principal/School Leader	126,000	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	\$10,500	126,000	-	Monthly
Assistant Principal	80,000	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	80,000	-	Monthly
Special Education Coordinator	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Deans, Directors	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other (Specify in Assumptions)	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Administrative Compensation	206,000	17,167	17,167	17,167	17,167	17,167	17,167	17,167	17,167	17,167	17,167	17,167	17,167	206,000	-	

Instructional Staff

Teachers	330,000	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	\$27,500	330,000	-	Monthly
Special Education Teachers	55,000	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	\$4,583	55,000	-	Monthly
Educational Assistants/Aides	252,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	\$21,000	252,000	-	Monthly
Elective Teachers	110,000	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	\$9,167	110,000	-	Monthly
Other (Specify in Assumptions)	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Instructional Compensation	747,000	62,250	62,250	62,250	62,250	62,250	62,250	62,250	62,250	62,250	62,250	62,250	62,250	747,000	-	

Non-Instructional Staff

Clerical Staff	48,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	48,000	-	Monthly
Custodial Staff	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Operations	80,000	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	\$6,667	80,000	-	Monthly
Social Workers/Counselors	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other (Specify in Assumptions)	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	

Total Non-Instructional Compensation	128,000	10,667	10,667	10,667	10,667	10,667	10,667	10,667	10,667	10,667	10,667	10,667	10,667	128,000	-
Other Compensation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Other Compensation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Other Compensation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Other Compensation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Total Compensation	1,081,000	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	90,083	1,081,000	-

Employer Benefits & Taxes

Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1
2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25
Total Budget	July	August	Sept	Oct	Nov	Dec	January	Feb	March	April	May	June	Total	AR/AP

Assumption Notes

Social Security	67,022	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	\$5,585	67,022	-	Monthly
Medicare	15,675	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	\$1,306	15,675	-	Monthly
State Unemployment Disability/Life Insurance	7,600	\$633	\$633	\$633	\$633	\$633	\$633	\$633	\$633	\$633	\$633	\$633	\$633	7,600	-	Monthly
Workers Compensation Insurance	1,081	\$90	\$90	\$90	\$90	\$90	\$90	\$90	\$90	\$90	\$90	\$90	\$90	1,081	-	Monthly
Other Fringe Benefits	19,458	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	\$1,622	19,458	-	Monthly
Medical Insurance	-													-	-	
Dental Insurance	123,500	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	\$10,292	123,500	-	Monthly
Vision Insurance	5,700	\$475	\$475	\$475	\$475	\$475	\$475	\$475	\$475	\$475	\$475	\$475	\$475	5,700	-	Monthly
TCRS Certified Legacy	1,425	\$119	\$119	\$119	\$119	\$119	\$119	\$119	\$119	\$119	\$119	\$119	\$119	1,425	-	Monthly
TCRS Certified Hybrid	14,091	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	\$1,174	14,091	-	Monthly
TCRS Classified Legacy	34,052	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	\$2,838	34,052	-	Monthly
	-													-	-	

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET

TCRS Classified Hybrid	-													-	-	
Other Classified Retirement	67,319	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	\$5,610	67,319	-	Monthly
Other Retirement	-													-	-	

Total Employer Benefits & Taxes	356,922	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	29,744	356,922	-
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Operating Expenses

Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1	Year 1
2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25	2024-25
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP

Contracted Services

Assumption Notes

Professional Development	30,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	30,000	-	Monthly
Financial Services	65,000	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	\$5,417	65,000	-	Monthly
Audit Services	2,000							\$2,000						2,000	-	Jan
Legal Fees	5,000	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	5,000	-	Monthly
Copier Lease and Usage	9,000	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	\$750	9,000	-	Monthly
Internet and Phone Service	15,600	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	15,600	-	Monthly
Student Meals	178,200	\$0	\$17,820	\$17,820	\$17,820	\$17,820	\$17,820	\$17,820	\$17,820	\$17,820	\$17,820	\$17,820	\$0	178,200	-	Aug - May
Payroll Services	4,800	\$400	\$400	\$400	\$400	\$400	\$400	\$400	\$400	\$400	\$400	\$400	\$400	4,800	-	Monthly
Health Services	15,000	\$0	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$0	15,000	-	Aug - May
Transportation	125,000	\$0	\$12,500	\$12,500	\$12,500	\$12,500	\$12,500	\$12,500	\$12,500	\$12,500	\$12,500	\$12,500	\$0	125,000	-	Aug - May
IT Services	14,500	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	\$1,208	14,500	-	Monthly
Contracted SPED Services	16,000	\$0	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$0	16,000	-	Aug - May
Insurance	30,000	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500	30,000	-	Monthly
Postal Charges	720	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	720	-	Monthly
Bank Charges	1,000	\$83	\$83	\$83	\$83	\$83	\$83	\$83	\$83	\$83	\$83	\$83	\$83	1,000	-	Monthly

Supplies & Materials

Curriculum and Instructional Supplies	-													-	-	
SIS/Data Support	7,500	\$625	\$625	\$625	\$625	\$625	\$625	\$625	\$625	\$625	\$625	\$625	\$625	7,500	-	Monthly
Student Supplies	5,040	\$0	\$504	\$504	\$504	\$504	\$504	\$504	\$504	\$504	\$504	\$504	\$0	5,040	-	Aug - May
Faculty Supplies	4,750	\$396	\$396	\$396	\$396	\$396	\$396	\$396	\$396	\$396	\$396	\$396	\$396	4,750	-	Monthly
Library Books	4,320	\$0	\$4,320	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	4,320	-	Aug
Testing & Evaluation	14,400	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	\$1,200	14,400	-	Monthly
Student Laptops	8,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$8,000	8,000	-	Jun
Faculty Laptops	8,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$8,000	8,000	-	Jun
Office Supplies	6,000	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$500	6,000	-	Monthly
Printing Paper	1,440	\$120	\$120	\$120	\$120	\$120	\$120	\$120	\$120	\$120	\$120	\$120	\$120	1,440	-	Monthly
Field Trips	6,000			\$1,500			\$1,500			\$1,500			\$1,500	6,000	-	Quarterly
Student Uniforms	-													-	-	
Gifts & Awards - Students	1,440	\$0	\$144	\$144	\$144	\$144	\$144	\$144	\$144	\$144	\$144	\$144	\$0	1,440	-	Aug - May
Gifts & Awards - Teachers and Staff	1,900	\$0	\$190	\$190	\$190	\$190	\$190	\$190	\$190	\$190	\$190	\$190	\$0	1,900	-	Aug - May
Health Supplies	720	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	\$60	720	-	Monthly

Facility Related Expenses

Rent	270,000	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	\$22,500	270,000	-	Monthly
Utilities	36,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000	36,000	-	Monthly
Custodial	18,000	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	18,000	-	Monthly
Waste	2,400	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	\$200	2,400	-	Monthly
Faculty Furniture	-													-	-	
Classroom Furniture (staff and student)	-													-	-	
Internet/Network Equipment	2,500	\$208	\$208	\$208	\$208	\$208	\$208	\$208	\$208	\$208	\$208	\$208	\$208	2,500	-	Monthly
Other Equipment	-													-	-	
Building Decorum	2,000	\$167	\$167	\$167	\$167	\$167	\$167	\$167	\$167	\$167	\$167	\$167	\$167	2,000	-	Monthly
Tenant Improvements	-													-	-	

ATTACHMENT N: PLANNING AND BUDGET WORKSHEET

Other	-													-	-	
Other	-													-	-	
Other	-													-	-	
Other	-													-	-	
Other	-													-	-	
Other Charges																
Staff Recruitment	5,000	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	5,000	-	Monthly
Student Recruitment & Community Engagement	5,000	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	5,000	-	Monthly
Parent & Staff Meetings	1,500	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	\$125	1,500	-	Monthly
Authorizer Fee	35,000	\$0	\$0	\$0	\$17,500	\$0	\$0	\$0	\$17,500	\$0	\$0	\$0	\$0	35,000	-	Oct and Feb
Background checks	640	\$53	\$53	\$53	\$53	\$53	\$53	\$53	\$53	\$53	\$53	\$53	\$53	640	-	
Debt Service																
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Total Operating Expenses	959,370	46,123	84,701	81,881	97,881	80,381	81,881	82,381	97,881	81,881	80,381	7580,381	63,623	959,370	-	
Total Expenses	2,318,792	165,949	204,527	201,707	217,707	200,207	201,707	202,207	217,707	201,707	200,207	200,207	183,449	2,397,292	-	

Invictus Nashville
New Charter School Application Budget Template
Year 2 Through 5 Budget

Revenue Assumptions

	Year 1	Year 2	Year 3	Year 4	Year 5
	2024-25	2025-26	2026-27	2027-28	2028-29
Annual Revenue Increase	0.00%	0.00%	0.00%	0.00%	0.00%
Cumulative Increase	100.00%	100.00%	100.00%	100.00%	100.00%

State Revenues

Assumption

Assumption Notes

TISA Base Rate	\$6,860	987,840	\$1,481,760	\$1,975,680	\$2,469,600	\$2,963,520	See TISA calculator
TISA Weights	See Tracker	313,571	\$542,940	\$649,542	\$787,528	\$957,176	See TISA calculator
TISA Direct	See Tracker	111,514	\$167,270	\$223,027	\$314,784	\$370,541	See TISA calculator
TISA Local Extra	\$4,200	604,800	\$907,200	\$1,209,600	\$1,512,000	\$1,814,400	70% of current projected local extra rate for FY24
Other		-	\$0	\$0	\$0	\$0	

Federal Revenues

Title I	\$500	72,000	\$108,000	\$144,000	\$180,000	\$216,000	Assumes \$500/student
Title II	\$50	7,200	\$10,800	\$14,400	\$18,000	\$21,600	Assumes \$50/student
Title III	\$0	-	\$0	\$0	\$0	\$0	

NSLP	\$630	90,720	\$136,080	\$181,440	\$226,800	\$272,160	Assumes \$3.50/day reimbursement for lunch
E-Rate	\$20,000	20,000	\$20,000	\$20,000	\$20,000	\$20,000	Assumes \$20K annually
CSP Startup Grant	\$0	-	\$0	\$0	\$0	\$0	
IDEA	\$500	8,000	\$13,000	\$18,500	\$25,000	\$32,500	Assumes \$500/SPED student
NSLP - Breakfast	\$360	51,840	\$77,760	\$103,680	\$129,600	\$155,520	Assumes \$2/day reimbursement for breakfast
School Activity Revenues							
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Fundraising & Philanthropy							
BES Grant	\$0	-	\$0	\$0	\$0	\$0	
CSGF	\$0	-	\$0	\$0	\$0	\$0	
NSVF	\$0	-	\$0	\$0	\$0	\$0	
Board Fundraising	\$25,000	150,000	\$75,000	\$75,000	\$75,000	\$25,000	Assumes board will fundraising \$25K/classroom
Other	\$0	-	\$0	\$0	\$0	\$0	
Total Revenues		2,417,484	3,539,810	4,614,869	5,758,312	6,848,417	
Compensation							

Year 1	Year 2	Year 3	Year 4	Year 5
2024-25	2025-26	2026-27	2027-28	2028-29

Administrative Staff

Assumption Notes

Principal/School Leader	126,000	127,890	129,808	131,755	133,732	Executive Director with 1.5% COLA raise
Assistant Principal	80,000	81,200	82,418	83,654	169,818	Assistant Director(s) with 1.5% COLA raise; 2 by Y5
Special Education Coordinator	-	-	72,116	73,197	74,295	Director of Students Supports with 1.5% COLA raise
Deans, Directors	-	-	66,965	67,969	137,977	Dean(s)with 1.5% COLA raise; 2 by Y5
Other (Specify in Assumptions)	-	-	72,116	73,197	74,295	Director of Community Outreach & Partnerships with 1.5% COLA raise
Total Administrative Compensation	206,000	209,090	423,422	429,774	590,118	

-

Instructional Staff

Teachers	330,000	502,425	679,949	862,685	1,050,750	Lead Classroom Teachers with 1.5% COLA raise
Special Education Teachers	55,000	55,825	113,325	115,025	175,125	SPED Teachers with 1.5% COLA raise; 2 by Y3 and 3 by Y5
Educational Assistants/Aides	252,000	383,670	519,233	658,777	802,391	Assistant Teachers with 1.5% COLA raise
Elective Teachers	110,000	167,475	169,987	287,562	291,875	Related Arts with 1.5% COLA raise
Other (Specify in Assumptions)	-	42,630	43,269	43,918	89,155	Paraprofessionals with 1.5% COLA raise; 2 by Y5
Total Instructional Compensation	747,000	1,152,025	1,525,763	1,967,967	2,409,295	

Non-Instructional Staff

Clerical Staff	48,000	48,720	49,451	50,193	50,945	Office Manager with 1.5% COLA raise
Custodial Staff	-	-	-	-	-	
Operations	80,000	81,200	82,418	83,654	84,909	Director of Operations with 1.5% COLA raise
Social Workers/Counseling	-	-	-	-	-	

Other (Specify in Assumptions)	-	-	-	-	-	
Total Non-Instructional Compensation	128,000	129,920	131,869	133,847	135,855	
Other Compensation	-	-	-	-	-	
Other Compensation	-	-	-	-	-	
Other Compensation	-	-	-	-	-	
Other Compensation	-	-	-	-	-	
Total Compensation	1,081,000	1,491,035	2,081,055	2,531,587	3,135,268	

Employer Benefits & Taxes

Year 1	Year 2	Year 3	Year 4	Year 5
2024-25	2025-26	2026-27	2027-28	2028-29

Assumption Notes

Social Security	67,022	92,444	129,025	156,958	194,387	Assumes 6.2% of all wages
Medicare	15,675	21,620	30,175	36,708	45,461	Assumes 1.45% of all wages
State Unemployment	7,600	10,800	14,800	18,000	22,000	Assumes \$400/employee
Disability/Life Insurance	1,081	1,491	2,081	2,532	3,135	Assumes .1% of all wages
Workers Compensation Insurance	19,458	26,839	37,459	45,569	56,435	Assumes 1.8% of all wages
Other Fringe Benefits	-	-	-	-	-	
Medical Insurance	123,500	175,000	240,500	292,500	357,500	Assumes \$6500/employee annually
Dental Insurance	5,700	8,100	11,100	13,500	16,500	Assumes \$300/employee annually

Vision Insurance	1,425	2,025	2,775	3,375	4,125	Assumes \$75/employee annually
TCRS Certified Legacy	14,091	19,436	27,127	32,999	40,868	TCRS Legacy- assumes 15% of staff
TCRS Certified Hybrid	34,052	46,968	65,553	79,745	98,761	TCRS Hybrid- assumes 35% of staff
TCRS Classified Legacy	-	-	-	-	-	
TCRS Classified Hybrid	-	-	-	-	-	
Other Classified Retirement	67,319	92,854	129,598	157,655	195,249	Metro Support- assumes 50% of staff
Other Retirement	-	-	-	-	-	
Total Employer Benefits & Taxes	356,922	498,076	690,193	839,540	1,034,421	

Operating Expenses

	Year 1	Year 2	Year 3	Year 4	Year 5
	2024-25	2025-26	2026-27	2027-28	2028-29
Annual Expense Increase	0.00%	1.00%	1.00%	1.00%	1.00%
Cumulative Increase	100.00%	101.00%	102.01%	103.03%	104.06%

Contracted Services

Assumption Notes

Professional Development	\$10,000	30,000	\$20,000	\$20,000	\$20,000	\$20,000	Assumes 2 teachers per year will need Montessori training
Financial Services	\$65,000	65,000	\$65,650	\$66,307	\$66,970	\$67,639	Assumes \$65K annually for back-office services (AP, payroll, accounting, financial reporting, budgeting, etc.)
Audit Services	\$17,000	2,000	\$17,170	\$17,342	\$17,515	\$17,690	Assumes \$15K for audit and \$2K for 990 in Y2-5
Legal Fees	\$5,000	5,000	\$5,050	\$5,101	\$5,152	\$5,203	Assumes \$5K/year for legal retainer
Copier Lease and Usage	\$750	9,000	\$9,090	\$18,000	\$18,180	\$18,362	Assumes \$750/mo for 1 copier; 2 copiers by Y3

Internet and Phone Service	\$1,300	15,600	\$15,756	\$15,914	\$16,073	\$16,233	Assumes \$1300/mo for internet fees
Student Meals	\$990	178,200	\$179,982	\$181,782	\$183,600	\$185,436	Assumes \$5.50/day for breakfast and lunch
Payroll Services	\$400	4,800	\$4,848	\$4,896	\$4,945	\$4,995	Assumes \$400/mo for payroll processing fees
Health Services	\$1,500	15,000	\$15,150	\$15,302	\$15,455	\$15,609	Assumes \$1500/mo Aug- May
Transportation	\$75,000	75,000	\$151,500	\$153,015	\$229,545	\$231,841	Assumes \$75K/bus 50% participation, 72 students/bus
IT Services	\$14,500	14,500	\$14,645	\$14,791	\$14,939	\$15,089	Assumes \$9K annually for tech support, computer repairs and \$5.5k annually for erate consultant
Contracted SPED Services	\$1,000	16,000	\$26,000	\$37,000	\$50,000	\$65,000	Assumes \$1K/SPED student
Insurance	\$30,000	30,000	\$35,300	\$40,653	\$46,060	\$51,520	Assumes \$30K plus \$5K for each additional grade annually for D and O liability insurance
Postal Charges	\$5	720	\$1,080	\$1,440	\$1,800	\$2,160	Assumes \$5/student
Bank Charges	\$1,000	1,000	\$1,010	\$1,020	\$1,030	\$1,041	Assumes \$1K annually

Supplies & Materials

Curriculum and Instructional Supplies	\$18,750	-	\$59,250	\$59,250	\$59,250	\$5,000	Assumes \$25K/ new classroom for curriculum, manipulatives, classroom furniture, Montessori testing, etc. + \$3K annually for replacements; Y5 assumes \$5K for replacements
SIS/Data Support	\$7,500	7,500	\$7,575	\$7,651	\$7,727	\$7,805	Assumes \$5K for enrollment software and \$2.5K for SIS annually
Student Supplies	\$35	5,040	\$7,560	\$10,080	\$12,600	\$15,120	Assumes \$35/student for consumable materials
Faculty Supplies	\$250	4,750	\$6,750	\$9,250	\$11,250	\$13,750	Assumes \$250/FTE
Library Books	\$30	4,320	\$6,480	\$8,640	\$10,800	\$12,960	Assumes \$30/student for classroom libraries
Testing & Evaluation	\$100	14,400	\$21,600	\$28,800	\$36,000	\$43,200	Assumes \$100/student for MAP, Aimsweb, Dibels, and Transparent Classroom
Student Laptops	\$8,000	8,000	\$8,080	\$8,161	\$8,242	\$8,325	Assumes \$8K/laptop cart, 30 laptops/cart, 1 cart/3 classrooms; Y5 includes funds for replacements
Faculty Laptops	\$1,000	8,000	\$10,000	\$7,000	\$10,000	\$5,000	Assumes \$1K/laptop for new employees
Office Supplies	\$500	6,000	\$6,060	\$6,121	\$6,182	\$6,244	Assumes \$500/mo
Printing Paper	\$10	1,440	\$2,160	\$2,880	\$3,600	\$4,320	Assumes \$10/student
Field Trips	\$3,000	6,000	\$9,000	\$12,000	\$15,000	\$18,000	Assumes \$3K/grade

Student Uniforms	\$0	-	\$0	\$0	\$0	\$0	
Gifts & Awards - Students	\$10	1,440	\$2,160	\$2,880	\$3,600	\$4,320	Assumes \$10/student for incentives and recognition awards
Gifts & Awards - Teachers and Staff	\$100	1,900	\$2,700	\$3,700	\$4,500	\$5,500	Assumes \$100/FTE for staff appreciation, etc
Health Supplies	\$5	720	\$1,080	\$1,440	\$1,800	\$2,160	Assumes \$5/student

Facility Related Expenses

Rent	\$15	270,000	\$270,000	\$525,000	\$525,000	\$525,000	Assumes \$15/18,000 sqft in Y1-2; 35,000 sqft in Y3-5
Utilities	\$2	36,000	\$36,000	\$70,000	\$70,000	\$70,000	Assumes \$2/18,000 sqft in Y1-2; 35,000 sqft in Y3-5
Custodial	\$1	18,000	\$18,000	\$35,000	\$35,000	\$35,000	Assumes \$1/18,000 sqft in Y1-2; 35,000 sqft in Y3-5
Waste	\$200	2,400	\$2,424	\$2,448	\$2,473	\$2,497	Assumes \$200/mo
Faculty Furniture	\$2,000	-	\$2,000	\$2,020	\$2,040	\$2,061	Assumes \$2k annually for replacements
Classroom Furniture (staff and student)	\$6,250	-	\$20,250	\$20,250	\$20,250	\$5,000	Assumes \$6,250/classroom for staff and student furniture + \$1,500 annually for replacements; Y5 assumes \$5K for replacements
Internet/Network Equipment	\$2,500	2,500	\$2,525	\$2,550	\$2,576	\$2,602	Assumes \$2500 annually for upgrades and repairs
Other Equipment	\$0	-	\$0	\$0	\$0	\$0	
Building Decorum	\$2,000	2,000	\$2,020	\$2,040	\$2,061	\$2,081	Assumes \$2K annually for signage
Tenant Improvements	\$200,000	-	\$200,000	\$0	\$0	\$0	Assumes \$200K for tenant improvements in Y2 to convert additional sqft of space to school
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	

Other Charges

Staff Recruitment	\$5,000	5,000	\$5,050	\$5,101	\$5,152	\$5,203	Assumes \$5K annually for postings, fairs, travel, stipends to recruit specific certified staff
Student Recruitment & Community Engagement	\$5,000	5,000	\$5,050	\$5,101	\$5,152	\$5,203	Assumes \$5K annually for mailers, ads, referral incentives, etc.
Parent & Staff Meetings	\$1,500	1,500	\$1,515	\$1,530	\$1,545	\$1,561	Assumes \$1,500 annually for supplies for parent and staff meetings
Authorizer Fee	\$35,000	35,000	\$35,000	\$35,000	\$35,000	\$35,000	Assumes \$35K max authorizer fee
Background checks	\$40	640	\$320	\$400	\$320	\$400	Assumes \$40/new employee for background checks
Debt Service							
Other	\$0	-	-	-	-	-	
Other	\$0	-	-	-	-	-	
Other	\$0	-	-	-	-	-	
Other	\$0	-	-	-	-	-	
Other	\$0	-	-	-	-	-	
Total Operating Expenses		959,370	1,361,340	1,515,839	1,637,857	1,611,098	
Total Expenses		2,397,292	3,350,451	4,287,086	5,008,985	5,780,787	

Invictus Nashville
New Charter School Application Budget Template
Year 0 & Years 1 through 5 Summary

Revenue Assumptions

	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Starting Fund Balance	-	98,246	118,438	307,797	635,581	1,384,908
State Revenues	-	2,017,724	3,099,170	4,057,849	5,083,912	6,105,637
Federal Revenues	-	249,760	365,640	482,020	599,400	717,780
School Activity Revenues	-	-	-	-	-	-
Fundraising & Philanthropy	890,000	150,000	75,000	75,000	75,000	25,000
Total Revenues	890,000	2,417,484	3,539,810	4,614,869	5,758,312	6,848,417
Staffing	195,500	1,081,000	1,491,035	2,081,055	2,531,587	3,135,268
Employer Benefits & Taxes	29,584	356,922	498,076	690,193	839,540	1,034,421

Contracted Services	27,350	511,820	610,731	641,547	740,738	767,787
Supplies & Materials	204,750	69,510	150,455	167,852	190,551	151,703
Facility-Related Expenses	320,450	330,900	553,219	659,309	659,399	644,241
Other Charges	14,120	47,140	46,935	47,131	47,168	47,367
Debt Service	-	-	-	-	-	-
Total Expenses	791,754	2,397,792	3,350,451	4,287,086	5,008,985	5,780,787
Net Income	98,246	20,192	189,359	327,783	749,327	1,067,630
Ending Fund Balance	98,246	118,438	307,797	635,581	1,384,908	2,452,538

TISA - FY24 Projections							
Element	Amount		Students/Services				Funding
Base	\$6,860.00	x	144.00		.	=	987840
WEIGHTS	Weight		Students/Services				Funding
Economically Disadvantaged	25%	x	51.84	x	\$6,860	.	88905.6
Concentrated Poverty	5%	x	144.00	x	\$6,860	.	49392
Small	5%	x	0.00	x	\$6,860	.	0
Sparse	5%	x	0.00	x	\$6,860	.	0
ULN 1	15%	x	2.00	x	\$6,860	.	2058
ULN 2	20%	x	4.00	x	\$6,860	.	5488
ULN 3	40%	x	4.00	x	\$6,860	.	10976
ULN 4	60%	x	1.00	x	\$6,860	.	4116
ULN 5	70%	x	26.00	x	\$6,860	.	124852
ULN 6	75%	x	3.00	x	\$6,860	.	15435
ULN 7	80%	x	1.00	x	\$6,860	.	5488
ULN 8	100%	x	1.00	x	\$6,860	.	6860
ULN 9	125%	x	0.00	x	\$6,860	.	0
ULN 10	150%	x	0.00	x	\$6,860	.	0
DIRECT							
K-3 Literacy	\$500.00	x	144.00		.	=	\$72,000.00
4th Grade Tutoring	\$500.00	x	0.00		.	=	\$0.00
CTE	\$5,000.00	x	0.00		.	=	\$0.00
Charter	\$274.40	x	144.00		.	=	\$39,513.60
ACT	\$185.34	x	0.00		.	=	\$0.00
OTHER FUNDING							
Outcomes							Calculated annually
Fast-Growing							Calculated annually
Salary Equity							Calculated annually
TOTAL							\$1,412,924.20

ATTACHMENT O: BUDGET NARRATIVE

BUDGET NARRATIVE

A. Introduction and Mission Support

Invictus Nashville Charter School has prepared the following budget narrative for proposed financial activity during its Planning Year through its 5th Year of operations. The following sections detail the enrollment and student population assumptions, a summary of revenue and expense assumptions, a discussion of sustainability, cash flow, contingency plans, and financial management.

The proposed budget is adequate to fully implement the proposed school model because there are layers of contingencies and conservatism. The budget fully aligns with the model of the school outlined in the narrative and accounts for costs needed to implement it. The budget ensures that Invictus Nashville Charter School can fully implement the Montessori Model. Salaries are reflective of what's needed for credentialed teachers. Classroom materials, curriculum, furniture, etc. are also included. Appropriate testing materials and professional development specific to the Montessori model is accounted for, as well.

Our theory of student achievement is grounded in individualized support for each student as they define their path to professional and personal freedom. It is our belief that when students receive the right support at the right time, they can all achieve at high levels. Our budget reflects this belief by focusing on student and teacher retention, allocating the appropriate funds for our Montessori supplies, and a lean leadership structure that funnels focus into expertise instead of traditional structures.

B. Enrollment Assumptions and TISA Projections

Invictus Nashville Charter School has assumed the following enrollment plan below when creating a five-year outlook:

Figure 3.2 (a): Enrollment Assumptions

Grade Level	Year 1 2024	Year 2 2025	Year 3 2026	Year 4 2027	Year 5 2028
K	*72	72	72	72	72
1	72	72	72	72	72
2		72	72	72	72
3			72	72	72
4				72	72
5					72
Totals	144	216	288	360	432

Invictus Nashville Charter School plans to locate their school in District 4 which is the McGavock Cluster inclusive of Hermitage, Donelson, and Old Hickory. The priority target population will be families that live in District 4. However, as a public charter school, we will recruit students from all areas of Davidson County. All TISA revenue is driven off enrollment projections. We will work towards enrollment of 84 students per grade to account missed enrollment targets and/or attrition. 84 students will not require

any additional staff, classrooms, etc. and will keep classrooms within the desired Montessori ratio. The additional revenue will exceed the additional cost.

Other Demographic Factors

Invictus Nashville Charter School anticipates its demographics to be consistent with the surrounding schools in District 4. For budgeting purposes, we have assumed the following:

- 40% of the student population will qualify for free or reduced lunch
- 11% of the student population will have an active IEP (the percentage will increase by 1% each year under the assumption that more needs will be identified over time)
- 18% of the student population will be ELL students

C. Funding Sources

During Invictus Nashville Charter School's planning year, the school anticipates four sources of funding. The first funding source is the Build, Excel, Sustain Fellowship (BES) grant. As a BES Fellow, the proposed Executive Director has been considered for a portion of the 500K the Fellowship provides for its Fellows. Invictus Nashville Charter School was awarded \$125K. In addition to the funding, the fellowship will offer follow-on support during their first year. A letter of support will be provided in **Attachment E**.

The second is from Charter School Growth Fund (CSGF) through their "seed funding" grant. CSGF is anticipating making awards up to \$500K per applicant. Invictus Nashville Charter School has applied. The Invictus Nashville application has met all requirements to be considered a high-quality applicant. Invictus Nashville is confident in receiving the full \$500,000, but only included \$400,000 in the budget to be conservative. This revenue source will help cover the planning year staff's salary and benefits expenses, along with other start-up expenses including preparing a facility for students, student and staff recruitment, and general school planning. Recipients will be determined by April 2023.

The third source of funding is from New School Venture Fund (NSVF). The grant is for \$215K. Recipients will be determined by May 2023. This funding is designed to help early-stage charter organizations launch their first and/or second school in a new network, and support district schools to develop and implement innovative instructional designs within new schools. In addition to financial support, recipients participate in an active community of practice to build relationships with and learn from peer organizations from across the country and recipients receive relevant, timely and differentiated support. This includes access to experts in the field, coaching, and resources.

The fourth source of funding is from the board level fundraising at \$150K. The board is committed to raise \$25K per classroom to purchase curriculum, learning materials, furniture, etc. plus an additional \$75K in Year 1 for general operating expenses. The board will set a goal of raising \$200K in Year 1 in order to still meet the \$150K budgeted amount if they should fall short.

During the first operational year (2024-25), Invictus Nashville Charter School anticipates the following public sources of funding: The figure below explains the revenue sources included in the Invictus Nashville budget followed with a detailed summary.

Figure 3.2(b): Revenue Sources

Revenue	Rate	Driver	Source of Rate Assumption
TISA Base Rate	\$6,860	Per student	See TISA Calculator
TISA Weights		See TISA Calculator	See TISA Calculator
TISA Direct		See TISA Calculator	See TISA Calculator
TISA Local Extra	\$4,200	See TISA Calculator- Rate Analysis Tab	70% of current projected local extra rate for FY24
Title I	\$500	Per student	Rate historically used in charter applications; no other info available
Title II	\$50	Per student	Rate historically used in charter applications; no other info available
IDEA	\$500	Per SPED student	Conservative estimated based on current paid rate
Erate	\$20,000	Annually	Estimate based on other schools' data
NSLP	\$3.50 lunch \$2 breakfast	Per student	Estimate based on other schools' data

TISA is calculated based on the state provided calculator using numbers from operating schools in district 4.

For the local extra, this is based on a conservative 70% of the current projected rate for FY24 provided by Afton Partners using the most current MNPS data. Additionally, since under TISA, districts are required to comply with the maintenance of effort by maintaining their current level of local extra funding from this year, we feel confident in including \$4,200 as that is lower than the current MNPS local extra contribution.

Invictus Nashville Charter School has assumed a conservative 0% inflation year-over-year increase in revenue as funding is subject to change. Invictus Nashville Charter School has assumed \$20,000 in Year 1

in E-rate funds which will offset the cost of the internet infrastructure installation and internet fees each year.

Invictus Nashville Charter School anticipates total revenues for Year 1 to exceed \$2.4 million. Annual revenues are anticipated to increase each subsequent year primarily due to an increase in student enrollment year over year. By Year 5, anticipated revenues are projected to exceed \$6.8 million.

D. Expenditures

Staffing

The staffing plan, outlined in the table below, establishes a foundation of administrative positions in Years 0 and 1. After Year 1, specific student-related positions scale with the size of the student body, as reflected below:

Figure 3.2 (c): Staffing Assumptions

Roles	Year 1	Year 2	Year 3	Year 4	Year 5
Executive Director	1	1	1	1	1
Assistant Director(s)	1	1	1	1	2
Director of Student Supports	0	0	1	1	1
Dean(s)	0	0	1	1	2
Director of Community Outreach and Partnerships	0	0	1	1	1
Lead Classroom Teachers	6	9	12	15	18
SPED Teachers	1	1	2	2	3
*Assistant Teachers	6	9	12	15	18
Related Arts	2	3	3	5	5
Paraprofessionals	0	1	1	1	2
Office Manager	1	1	1	1	1
Director of Operations	1	1	1	1	1
TOTAL STAFF:	19	27	37	45	55

**Denotes that at least one assistant teacher will be EL certified for every two grade levels to ensure compliance to the law.*

As noted by the table above, this pattern of growth will continue each year as the school continues to grow to reach scale in Year 5, 2028-2029, as a fully operating elementary school. The school will continue to add students and staff beyond year 5 to reach full scale growth with K-8 in 2031-2032. Several critical areas of operation that would otherwise have a school staffing requirement have been budgeted via contracted services from established local vendors and contractors. These areas include financial services, custodial services, legal counsel, and IT support.

Compensation

Salaries for staff are aligned with MNPS salary trends.

Leadership roles, such as the Executive Director and Assistant Director, as well as the Directors and Deans roles take the same approach. The Executive Director, Assistant Director and Director of Operations will start in Year 0. An additional Assistant Director will start in Year 5. The Director of Student Supports and Director of Community Outreach & Partnerships will start in Year 3. A dean will start in Year 3 and an additional dean will start in Year 5.

For the largest staffing category, teachers, the school has budgeted a starting salary of \$55,000 in Year 1.

Subject to their previous experience and credentials, the school may be able to offer a salary less than \$55,000, while other more experienced teachers may be offered a salary above \$55,000. This is inclusive of lead classroom teachers, SPED teachers and related arts teachers. The same concept will be applied to assistant teachers and paraprofessionals with a starting salary of \$42,000.

Additionally, an Office Manager will start in Year 1 at \$48,000.

A 1.5% increase has been applied to all future year salaries as a cost-of-living adjustment. This increase is not a guaranteed compensation increase, but rather to cover rising costs and inflation in the industry. Resources permitting, Invictus Nashville Charter School will evaluate opportunities to increase compensation and/or add bonuses to remain competitive.

Employer Benefits and Liabilities

Invictus Nashville Charter School has assumed the standard 6.2% and 1.45% on all wages each year for Social Security and Medicare employer contributions, respectively.

State unemployment has been budgeted at \$400/employee. Workers compensation insurance, which is usually purchased in conjunction with general liability and D&O insurance, has been estimated at 1.8% of total compensation.

For the purposes of estimating employer contributions to the Tennessee Consolidated Retirement System (TCRS), Invictus Nashville Charter School has assumed an 8.69% employer contribution for Certified Legacy staff (assumed at 15% of staff), a 9% employer contribution for Certified Hybrid staff (assumed at 35% of staff), and a 12.46% employer contribution for Classified staff (assumed at 50% of staff).

Medical, dental, and vision insurance employer contributions have been approximated at \$6,875 (\$6,500 medical, \$300 dental, \$75 vision) per full time equivalent (FTE) based on actual costs paid by multiple existing Nashville charter schools. There may be different costs associated for certified and classified insurance programs and different costs depending on the type of plan participation (single, single+1, and family). The \$6,875 per FTE represents the proposed financial capacity of the school to contribute towards insurance costs. Given the number of drivers that will go into the final cost, the

school has conservatively prepared to incur these costs for all FTEs. Each subsequent year, a 5%-year over-year increase has been assumed to reflect potential health insurance cost increases that may be realized in future years.

Salaries and benefits, in total, represent 60% to 72% of the school's operating expenses.

Contracted Services

Contracted services are expected to grow as the school grows. Starting at approximately \$512K in Year 1, this will increase to around \$768K in Year Five. The major expenses in this category in the first year are:

- \$178,200 – for student meals at \$2/student for breakfast, \$3.50/student for lunch
- \$30,000 – for D and O liability insurance
- \$65,000 – a flat estimate for financial services to be provided by a back-office provider in lieu of hiring a CFO (AP, payroll, accounting, financial reporting, budgeting, etc.)
- \$30,000 – for half of lead teachers Montessori training (assumed other half are already credentialed)
- \$125,000- \$75K for one bus at 50% participation or 72 students; \$50K for SPED transportation, if needed

In addition, the school plans on incurring additional expenses that are critical to the successful operation of the school. These contracted expenses include but are not limited to audit services, legal fees, copier fees, internet/phone service, payroll services, health services IT services, contracted SPED services, postal and bank charges.

Supplies & Materials

Year 1 has approximately \$70K budgeted in various supplies and materials, both instructional and noninstructional in nature. This also includes staff and student computers. By Year 5, this category totals about \$152K. These expenses, depending on the line item, are driven either by the number of students (new or total), number of staff members (new or total) or a flat rate. These expenses include curriculum and instructional supplies, SIS/data support, student/staff supplies, library books, testing/evaluation, paper, field trips, gifts and awards and health supplies.

Facilities

The school is planning to rent a facility and incur the cost of renovations if needed starting in June of the planning year. The school plans to rent a property in District 4 and has budgeted two rounds of \$200K of tenant improvements to bring the building to code and to ensure it can be used with the Montessori model. Rent is budgeted at \$15/mo at 18,000 sqft through Year 2. By Year 3, the school plans to increase this square footage to 35,000. Utilities have been budgeted at \$2/sqft, along with janitorial services at \$1/sqft based on historical averages in the area. Waste pickup has been budgeted at \$200 per month. Additionally, furniture, internet infrastructure and upkeep, and building decorum/signage are included here.

Other Charges

The school has budgeted \$47K for other charges in Year 1. These include \$5k for staff recruitment, \$5K for student recruitment and community engagement, \$1.5K for parent/staff meetings and the maximum \$35K for the required authorizer's fee.

Financial Sustainability

Reviewing the school's projected operating income over the first five years, Invictus Nashville Charter School is projecting positive operating incomes in all five years with a growing fund balance year over year. Between Planning Year and Year 1, we see operating incomes of \$98K and \$20K, respectively. In Year 2, we see an increase in the operating income totaling \$189K for that fiscal year. In years 3, 4, and 5, the school is positioned to post operating income gains of \$328K, \$749K, and \$1.1M, respectively. Overall, the preliminary financial plan is strong, with the fund balance approaching the \$2.5M mark by Year 5, or roughly 42% of forecasted expenses that year.

Cash Flow

A cash flow has been provided for the periods between July 2023 through June 2024, and then July 2024 through June 2025. Revenue and expenses have been aligned to their typical schedules of distribution, and where possible, schedules have been differentiated to reflect the nature of how Nashville charter schools receive and spend money based on the time of the year.

The cash flow assumes the major following assumptions:

- The school will receive its BES funding of \$150K by August 2023
- The school will receive its CSGF funding of \$200K by August 2023 and an additional \$200K by January 2024
- NSVF will be received in October 2023
- The Board fundraising will come in \$25K increments every other month in Year 0 and in two installments in Year 1
- TISA funds will be distributed in ten payments from August through June, except for a payment in May. This is the state-mandated distribution schedule.
- Title I/II and NSLP funding is projected November through June account for the processing of funding requests, any compliance documents, etc. at the beginning of each year
- IDEA funding is projected in January and June each year starting in Year 1
- Erate is projected in June 2024 each year starting in Year 1
- All staffing and benefit expenses are projected over 12 months, with the exception of the start of the Executive Director in August 2023 and the Assistant Director and Director of Operations in January 2024.
- Most expense categories are aligned to a 10 or 12-month schedule with some targeted spending to occur in the front part of year to align with expenses incurred when the school is opening and some customized otherwise based on historical data
- Expenses related to school activities, such as student meals, have been budgeted to align with the 10 months of instruction, from August through May.
- Planning year revenue and expenses are projected to start in August 2023 or later once Invictus Nashville is approved; should Invictus Nashville need to appeal to the state, projected timing for revenue and expenses would be pushed back to start in October 2023 or later. This would result

in a ~\$24K savings in YO in the Executive Director’s salary and benefits.

E. Financial Controls

These draft financial policies and controls were adopted from EdTec. EdTec was contracted by the proposed Executive Director to help develop the budget in this application. EdTec is a social enterprise committed to improving public education by supporting charter schools with business, operations, and performance services. It is the intent of these Financial Policies and Procedures to implement both the letter and spirit of all applicable State and Federal regulations regarding the expenditure of and accounting for public funds. These Policies and Procedures may need to be modified as the school develops and regulations change. The Board of Directors (“Board”) should approve these financial policies and revisit them periodically.

I. PURCHASES

- A. Authorization of Expenditures: All purchases of goods and services shall be consistent with the Board-approved budget. These purchases shall not require Board-approved/executed contracts, with the exception of expenditures in total annual amounts greater than \$10,000. All other proposed expenditures must be approved by the Executive Director, who will review the proposed expenditure to determine whether it is consistent with the Board adopted budget and sign the check request and purchase order forms (if applicable).
- B. Contracts
 1. All professional consulting services shall be provided for under a contract.
 2. Contracts for other goods and services exceeding \$10,000 on an annual basis shall be presented to the Board for approval prior to signing. Length of contracts shall be at the discretion of the Board. Contracts exceeding \$10,000 require a bidding process of sufficient duration to ensure competition. However, the Executive Director may make a finding to the Board for sole sourcing a contract exceeding \$10,000; in this case, the Board may also approve the contract in arrears at the time of contract execution. (The basis for such a finding may include: time/urgency issues; the absence of competitors; high service/quality from a particular contractor).
 3. Additional board approval is recommended in cases when scope or cost of an approved contract has materially changed. (more than 20%). Bid tabulations shall be presented to the Board along with a recommendation for action by the Finance Committee. The Board reserves the right to select whichever vendor it deems most prepared to provide the required goods/ services without regard to the low bidder being the automatic selection.
- C. Invoices
 1. Invoices under \$10,000 must be approved by one of the following authorized positions: Executive Director, approved school leader or Director of Operations.
 2. Invoices for \$10,000 or more must be approved by the Executive Director and one of the following authorized positions: Director of Operations or Board Treasurer.
- D. Accounts Payable: The school shall abide by EdTec accounts payable policies and procedures set forth separately.

- E. Credit and Debit Card Usage: Unless otherwise specified by the Board of Directors and/or school management, the use of School debit cards shall not be allowed for any School purchase. The School has an approved combined credit card limit of \$50,000. Authorized card holders include the Executive Director and current Operations Manager. Credit card statements will be reconciled on a monthly basis.
- F. Other Electronic Payments: Other electronic methods (wire, ACH, transfer between bank accounts, etc.) shall not be permitted for payment of any expenses or reimbursements in excess of \$5,000 without the express written consent of the Executive Director and Board Treasurer.
- G. Employee Reimbursements: Business use of telephones or cell phones shall be reimbursed. Business meals shall be reimbursed using standard applicable IRS guidelines. Under no circumstances shall alcohol be reimbursed. The Executive Director must obtain either the Director of Operations or a Board member's authorization on reimbursement requests payable to the Executive Director's name.
- H. Personal Use of School Funds: Use of School funds for personal use is prohibited. Violation of this policy shall result in discipline up to and including dismissal or removal, including from the Board.

II. BANKING

A. General Checking Account

1. The Board shall authorize the establishment of commercial bank accounts for the purposes of School operations. Funds will be deposited in non-speculative accounts including federally insured savings and/or checking accounts and/or invested in nonspeculative federally backed instruments and/or standard money market accounts.
2. The General Checking Account shall be the primary account for School needs. Authorized signatories to this account shall be the Executive Director approved school leaders, Director of Operations, and Board Treasurer. Checks above \$10,000, and checks payable to an authorized signer, must be signed by two authorized people. Authorized signers for checks above \$10,000 from this account shall be the Executive Director, Director of Operations, and Board Treasurer.
3. The General Checking Account shall be reconciled monthly by an outsourced back-office provider that does not have the ability to approve expenses or disburse funds from the account.

B. Deposits of Receipts – The School will deposit all funds received as soon as practical upon receipt. The Operations Manager of each school will open all mail daily, immediately sort all checks and forward them to the Director of Operations or Executive Director. The Executive Director or Director of Operations will immediately endorse the checks to the appropriate school bank account and prepare appropriate deposits as soon as practical.

III. TRAVEL POLICIES

A. Employee Mileage Reimbursement

1. All employees are reimbursed at the standard mileage rate per mile as determined by the Internal Revenue Service for use of their own vehicle for business related travel preapproved by their supervisor. In addition, parking fees and tolls paid are reimbursable if supported by receipts.

2. All employees requesting such mileage reimbursement are required to furnish an Expense Report containing the destination of each trip, its purpose and the miles driven, parking fees and tolls, within one month after the travel date, supported by receipts, if applicable.
3. Notwithstanding the above, the school may adopt a separate policy to supplement the above policies and procedures

IV. OTHER PRACTICES

- A. Budget Adoption: A budget shall be adopted by the Board no later than June 30 prior to the start of each new fiscal year, or earlier if required by the authorizing entity. During the course of the year, the Board may adopt an amended budget as expenses and revenue projections change.
- B. Board Meetings: The Board shall review financial statements at periodic Board meetings. The Board shall also review and approve the monthly check registers from the General Checking Account.
- C. Conflict of Interest: Any Board member with a financial interest in a matter presented to the Board shall fully disclose such interest prior to Board discussion on the issue and shall recuse themselves from the discussion and voting on the matter. The Board shall develop a separate more comprehensive policy on conflict of interest, hiring of relatives, and compliance with Tennessee Code Annotated and IRS requirements.
- D. Payroll
 1. New Employees: Requests for new employees shall be initiated by the Executive Director and be consistent with the approved annual personnel budget. New employees shall complete an Application for Employment and all necessary paperwork for payroll. New employees shall be fingerprinted, and TB tested consistent with State law. Fingerprint and background clearance must be received by the school before any employee may start work.
 2. Employees shall accrue vacation and sick leave time based on the personnel policy of the school.
 3. Timekeeping (for hourly staff)
 - i. The Executive Director or Director/Principal shall develop procedures to ensure accurate and timely preparation of timesheets for hourly employees.
 - ii. Authorized timesheets shall be forwarded to EdTec according to EdTec policies and procedures set forth separately. Payroll processing and payment shall take place according to EdTec policies and procedures set forth separately.
- E. Independent Contractors: The School shall only engage independent contractors: The School shall only engage independent contractors if the following practices are followed:
 1. The expense is within the approved budget or separately approved by the Board.
 2. The contractor provides IRS form W-9;
 3. IRS rules are followed regarding classification of staff as contractors versus employees; and
 4. The work is done under contract.
- F. Capitalization and Depreciation: The School will capitalize and depreciate all assets costing \$5,000 or more. All other assets are charged to expense in the year incurred.

Capitalized assets are recorded at cost and depreciated under the straight-line method over their estimated useful lives which can range from:

- Leasehold Improvement – Lease term or 5 years, whichever is shorter
- Equipment – 3 years
- Furniture – 5 years

Repair and maintenance costs, which do not extend the useful lives of the assets, are charged to expense. The cost of assets sold or retired and related amounts of accumulated depreciation are eliminated from the asset accounts, and any resulting gain or loss is included in the earnings in the year.

G. Disposal of Surplus Property and Donations:

Surplus property shall mean property that is no longer in use, is damaged beyond repair, or that the school feels will have no future value to the school's program, and that is declared to be surplus property by the Board. If the School wishes to dispose of equipment or other surplus property, the Board shall declare the property surplus and shall direct the staff on the actual means of disposal of the property, such as sale, donation, or destruction and disposal.

If the School wishes to donate equipment or other surplus property, the Board shall declare the property surplus and authorize the donation. Requirements for potential receiving organizations shall include: (1) the receiving organization is fully independent of the school, with none of the School's Board members or key personnel involved in the receiving organization; and (2) the receiving organization shall be a non-profit or governmental entity related to education. In addition, the school shall secure a receipt from the receiving organization for the donated property and shall remove the asset from the school's books and record the donation as required by state and federal audit guidelines.

Property Acquired with Federal Grant Funds

If the property in question costs \$500 or more at the time of acquisition and was acquired with federal grant funds, the school shall notify the federal contract administrator prior to donating or disposing of such property as provided above.

F. Independent Audit

- An annual audit by an outside firm shall be performed each year on the close of the prior year's books. The audit shall be performed in advance of the statutory audit deadline for Tennessee charter schools. The audit shall include, but not be limited to, (1) an audit of the accuracy of the school's financial statements, (2) an audit of the school's attendance accounting and revenue claims practices, and (3) an audit of the School's internal controls practices.
- If the School receives over \$750,000 from federal sources, the audit shall be prepared in accordance with any relevant Office of Management and Budget audit circulars.
- The audit firm shall be on the State approved list of auditors.
- At the conclusion of the audit, EdTec will review the audit with the Board and propose any changes necessary in operating procedures to comply with audit findings.
- Form 990 Federal Tax Return: The selected audit firm will prepare the Form 990 tax return and send a copy to the school staff responsible for the audit. The school staff will review and send a copy to the Board of Directors for its review and approval before filing. Once approved by the Board, the school will notify the audit firm who will then prepare the final return for filing.

G. Fiscal Roles and Responsibilities

The following positions hold varied levels of responsibilities as it relates to school finances:

- **Director of Operations:** In addition to overseeing Invictus Nashville Charter School's daily business activities by managing resources and developing and implementing organizational plans for the school, this person will oversee and manage vendor relationships, manage grants (reporting, reimbursements, tracking offsetting expenses), manage procurement and resource allocation, work with the back-office provider to review monthly financials and present at board meetings as needed

and submit coding, back-up, payroll information and financial documentation to back-office provider.

- **Board Treasurer:** In collaboration with the Executive Director and Director of Operations, our proposed Founding Board Treasurer will review fiscal and budget analysis and reconciliations for accuracy, support with preparation of financial reports as needed, review restricted budget and documentation for compliance and review the school’s financial documentation monthly to ensure compliance with State and Federal regulations.
- **Executive Director:** The Executive Director will support with oversight, management and control of school budget, complete monthly reviews of school finances with the Director of Operations and back-office provider and review and approve financial reports to be submitted to the board monthly.
- **Back-office Provider:** The School will contract with a back-office provider who will serve as an uninterested party to provide fiscal management resources.

3.2 Attachment O, Section E for financial policies for the details of purchasing approval and criteria.

H. Back-Office Provider

Financial Management

Invictus Nashville Charter School will outsource the financial responsibilities to a back-office provider. Once determined, the back-office provider will provide accounting, AP, payroll, budgeting, forecasting and long-term planning. The Director of Operations will manage the back-office provider relationship; the Executive Director and Board Treasurer will review all financials, reports, etc. The back-office provider will work directly with the school’s auditor to provide all necessary financial information and work as the liaison to ensure the auditor completes and submits the audit accurately and timely. The school has budgeted for an auditor and plans to bid this service out. Additionally, the Audit/CPA firm will file the 990 on behalf of the school.

The back-office provider will work with the school to ensure completion and submission of all district/state/federal required financial reporting. The school will vet the internal controls of the back-office provider. Please see **3.2 Attachment O, Section E** for Invictus Nashville Charter School’s preliminary financial policies that the school will present to the board for approval. The school will also run an independent annual audit of their internal systems and controls to ensure any issues are addressed quickly and thoroughly. The school will seek guidance for this from their back-office provider, CPA firm and other schools.

I. Team Finance Expertise

Financial expertise and the ability to provide fiscal oversight was a key consideration in building out the Invictus Nashville Charter School Founding Board of Directors, because we know that having the team in place to provide this important oversight is critical for the success of a startup charter school. This priority has resulted in a team with members that are equipped and ready to be responsible fiscal stewards:

- **Proposed Executive Director, Dr. Brenda Jones:** As a BES Fellow, Dr. Jones has participated in over 1200 hours of training geared to prepare and support school leaders in the founding and opening a new charter school. Part of this training has been focused on financial management – budgeting, fiscal controls, and sustainability. Previously, Dr. Jones was a co-founder of Nspire Tutoring Center during the pandemic. She managed the budget for her organization. In addition, as a member of the leadership team at a local MNPS Charter School, Dr. Jones managed portions of the budget to support students and staff.

- **Board Member, Dawana Wade:** Ms. Wade is currently the Chief Executive Officer for the Salama Urban Ministries. In her role, she manages the budget of the entire organization. She works with her team, the Board, and sponsors to ensure financial sustainability and feasibility. Part of his role is also grant management, which will be an asset to our work. Prior to this role, she spent years in multiple leadership positions within the YMCA of Middle Tennessee including leading the capital campaign and subsequent execution of the \$6M renovation and expansion of the Northwest Family YMCA, Nashville.
- **Board Member, Penelope Pak-McMillen:** Mrs. Pak-McMillen was a Founding Principal for several years. One of her core responsibilities was overseeing the financial management of the school and collaborating with the Board to ensure fiscal responsibility. In addition to this responsibility, she led their fundraising efforts, which ultimately raised a sustained 4 million dollars for the organization.
- **Board Member, Neysa Taylor:** Ms. Taylor has 20 years in communications. Her most recent role as Senior Communications Manager for two global brands (Amazon & McDonald's), Neysa has a proven track record of merging transparent communication with innovation to create impactful outcomes that drive the business forward. These roles have required her to manage several budgets for her department.

J. Contingency Plans

While creating a budget, there must be an evaluation of hypothetical, yet realistic situations regarding what the school would do should certain revenues not materialize, expenses run higher than the current budget projections, or the cash flow runs into issues. From a planning perspective, wherever possible, the school has tried to take the approach of under-estimating revenue and over-estimating expense by inflating salaries 1.5% and medical, dental, vision insurance 5% year over year, while not inflating revenues. This hedge, already built into the current budget outlook, is the first line-of-defense should there be some additional developments that worsen the financial picture. The school has taken the strategy of not assuming any CSP (Charter School Planning grant) funds. The school will apply for CSP at the full \$750K but didn't include it in the budget. This is strategic in order to have contingency plans for the grants that are included. The school will continue to apply for other grants, as well, as they become available. Post authorization, the school plans on continuing to establish rapport with local and national philanthropic funders who have historically aided other charters to strengthen its budget outlook.

Invictus Nashville Charter School has budgeted to rent a facility in the first several years of operation vs. purchase as a more prudent approach. The school also budgeted \$400K total for tenant improvements should they be needed. It is assumed that it can grow into a facility and pay rent on an "as utilized" basis within reason. This notion has been successfully implemented in several existing charter schools and is the ideal method through which the school would execute its facility plan. The school has budgeted to pay for 18,000 sqft through Y2 even though the full 18,000 won't be needed until Year 2. The school also budgeted the full 35,000 sqft starting in Year 3 even though that total square footage won't be needed until Year 5. This was to make sure there was a feasible plan for the timing of tenant improvement- two phases vs. annually. Two phases is the more economical approach. The funds allocated for renovating will get reallocated to the cost of a lease or other operating costs, if needed. Should the school need an additional facility contingency plan, it will pursue a lease with a church or a former school building. The school will also explore other options to ensure that if option 1 (renting and renovation) or option 2 (leasing space from a church) do not pan out, that they have explored the options of leasing modulars or looking at other commercial spaces. All options have been successfully executed by other charters.

This budget is a feasibility analysis based on the program and school design being proposed, but not necessarily the final operating budget; the budget will continue to undergo many revisions post authorization and into the next year. The planning year budget might have to be tailored to align with

the available startup resources or be reduced to generate a larger carryover into Year 1. Certain materials and furniture purchases might have to be delayed, or service contracts might have to be renegotiated for a reduced scope.

In summary, Invictus Nashville Charter School's budget has several lines of defense built in to be able to navigate any unforeseen obstacles. The school is committed to having positive operating incomes and fund balances all five years, and that commitment is what will drive budget decisions and revisions to address any potential shortfalls. In addition to pursuing a line of credit, both management and governance will pursue all avenues of cash flow financing, including but not limited to, vendor credit, credit cards, and any options available that can improve cash to have mitigation plans in place, if needed.

From an enrollment standpoint, the projected enrollment is lower than the max total number of students possible while maintaining the same number of staff, classrooms, etc. The school will plan to enroll 84 students per grade to create a cushion for missed enrollment targets, attrition, or anything else unforeseen. This is especially important as enrollment is the largest source of revenue.

K. Year 1 Cash-Flow Contingency

Invictus Nashville Charter School's cash flow projections are strong and steady, but if that changes, the school will manage the outflow of its payables and/or delay the timing of those payments. This is not outside of what other charter schools must do.

Additionally, the school would plan on utilizing the following techniques to bridge any potential cash shortfall:

- Establish a line of credit with a financial institution. Similar schools have been able to secure lines of credit in excess of \$150,000 before entering their first year of operation.
- Negotiate extended payment terms with vendors.
- Secure short-term private loans from philanthropic individuals.

Any potential cash shortfall would be manageable based upon the above techniques. These techniques have been utilized at other charter schools with success.

L. Unforeseen Student Support Needs

Invictus Nashville will accept any new student that resides in Davidson County regardless of race, socioeconomic status, previous achievement level, learning ability, English language proficiency, or zip code. Also, we will provide a Free and Appropriate Public Education (FAPE) for all students within the Least Restrictive Environment (LRE) possible.

Invictus Nashville has budgeted for an additional bus each year to support students with disabilities should that be needed.

Our commitment to serving all students, Therefore, should a need arise for a student(s) with disabilities that cannot be met by the already budgeted SPED staff and additional contracted SPED services, the school will revise the budget to meet that need. The school will reduce costs and shift staffing resources to fulfill that need. Additionally, the school will seek additional external funding/grants to support the SPED program. As mentioned earlier in this application, we will activate our contingency plan to problem solve and collaborate on solutions to ensure all services are provided given the mandates of any IEPs or 504 Plans.