



Executive Director's Recommendation

LEAD Southeast Elementary Appeal

Pursuant to Tennessee Code Annotated ("T.C.A.") § 49-13-108, sponsors proposing to open a new charter school may appeal the denial of its amended application by a local board of education to the Tennessee Public Charter School Commission ("Commission"). On August 1, 2024, the sponsor of LEAD Southeast Elementary ("LSEE" or "sponsor") appealed the denial of its amended application by the Metro Nashville Public Schools ("MNPS") Board of Education to the Commission.

Based on the procedural history, findings of fact, analysis, and Review Committee Recommendation Report, attached hereto, I believe that the decision to deny the LSEE amended application was contrary to the best interests of the students, local education agency ("LEA"), or community.¹ Therefore, I recommend that the Commission overturn the decision of MNPS Board of Education to deny the amended application for LSEE.

STANDARD OF REVIEW

Pursuant to T.C.A. § 49-13-108 and Commission Policy 2.000, Commission staff and an independent charter application review committee conducted a de novo, on the record review of LSEE's amended application. In accordance with the Tennessee Department of Education's charter application scoring criteria, "[f]or an application to be deemed eligible for approval, the summary ratings for all applicable categories [(academic plan and design, operations plan and capacity, financial plan and capacity, and portfolio review and performance record)] must be 'Meets or Exceeds the Standard'."² In addition, the Commission is required to hold a public hearing in the district where the proposed charter school seeks to locate.³

In order to overturn the decision of the local board of education, the Commission must find that the application meets or exceeds the metrics outlined in the Tennessee Department of Education's application-scoring rubric and that approval of the amended charter application is in the best interests of the students, local education agency, or community.⁴ If the local board of education's decision is overturned, then the Commission can approve the application, and thereby authorize the school, or affirm the local board's decision to deny.

PROCEDURAL HISTORY

1. The sponsor submitted a letter of intent to Metro Nashville Public Schools expressing its intention to file a charter school application.
2. The sponsor submitted its initial application for LEAD Southeast Elementary to MNPS on January 31, 2024.
3. MNPS assembled a review committee to review and score the LSEE initial application.
4. On March 25, 2024, MNPS's Review Committee conducted a capacity interview with representatives of LSEE.

¹ T.C.A. § 49-13-108.

² Tennessee Department of Education's Application to Create a Public Charter School Scoring Criteria, pg. 2.

³ T.C.A. § 49-13-108.

⁴ Id.

5. MNPS's Review Committee reviewed and scored the LSEE initial application indicating the academic, operations, finance, and past performance sections partially met standards.
6. On April 23, 2024, MNPS Board of Education voted to deny the LSEE initial application.
7. The sponsor amended and resubmitted its application for LSEE to MNPS on May 24, 2024.
8. MNPS's Review Committee reviewed and scored the LSEE amended application based on the charter application scoring rubric. The committee rated the academic plan and capacity as meets standard and the remaining sections as partially meets standard.
9. On July 23, 2024, the MNPS Board of Education voted to deny the amended application of LSEE.
10. The sponsor appealed the denial of the LSEE amended application in writing to the Commission on August 2, 2024, including submission of all required documents per Commission Policy 2.000.
11. The Commission's Review Committee independently analyzed and scored the LSEE amended application using the Tennessee Department of Education's charter school application scoring rubric.
12. The Commission's Review Committee conducted a capacity interview with key members of the LSEE leadership team on September 13, 2024 via Microsoft Teams.
13. On September 17, 2024, the Commission staff held a public hearing at Davy Crockett Tower in Nashville, Tennessee. At the public hearing, the Executive Director, sitting as the Commission's designee, heard presentations from the sponsor and MNPS and took public comment regarding the LSEE amended application.
14. After the capacity interview, the Commission's Review Committee determined a final consensus rating of the LSEE amended application, which served as the basis for the Review Committee Recommendation Report, attached hereto as **Exhibit A**.
15. The Commission staff conducted a full review of the record which includes the initial and amended applications submitted by the sponsor, documentation submitted by MNPS, and the findings of the public hearing and public comment. The Commission's General Counsel conducted a full review and legal analysis of the record.

FINDINGS OF FACT

District Denial of Initial Application

The Review Committee assembled by MNPS to review and score the LSEE initial application consisted of the following individuals:

Name	Title
Tieawasa Hodak	Director of Exceptional Education
Casey Minshall	Coordinator of English Learners
Robert Wallace	Executive Office of Resource Strategy
Ken Stark	Executive Director of Operations
David Williams	Executive Officer of Teaching and Learning
Sudhir Sinha	Data Coach of Research Assessment and Evaluation
Ryan Latimer	Director of Boundary and Planning
Casey Megow	Director of Facilities and Planning and Construction
Cordarrell Cobb	Partner School Budget Strategy
Gay Burden	External Consultant

The LSEE initial application received the following ratings from the MNPS Review Committee:

Sections	Ratings
Academic Plan and Design	Partially Meets Standard
Operations Plan and Capacity	Partially Meets Standard
Financial Plan and Capacity	Partially Meets Standard
Portfolio Review and Performance Record	Partially Meets Standard

After the MNPS Review Committee completed its review and scoring of the initial application, its analysis was presented to the MNPS Board of Education on April 23, 2024. The MNPS Board of Education voted to deny the initial application of LSSE.

District Denial of Amended Application

The Review Committee assembled by MNPS to review and score the LSEE amended application consisted of the following individuals:

Name	Title
Tieawasa Hodak	Director of Exceptional Education
Casey Minshall	Coordinator of English Learners
Robert Wallace	Executive Office of Resource Strategy
Ken Stark	Executive Director of Operations
Sudhir Sinha	Data Coach of Research Assessment and Evaluation
Ryan Latimer	Director of Boundary and Planning
Casey Megow	Director of Facilities and Planning and Construction
Cordarrell Cobb	Partner School Budget Strategy
Gay Burden	External Consultant

Upon resubmission, the MNPS Review Committee conducted a review of the amended application, and the amended application received the following ratings from the MNPS Review Committee:

Sections	Ratings
Academic Plan and Design	Meets or Exceeds Standard
Operations Plan and Capacity	Partially Meets Standard
Financial Plan and Capacity	Partially Meets Standard
Portfolio Review and Performance Record	Partially Meets Standard

After the MNPS Review Committee completed its review and scoring of the amended application, its analysis was presented to the MNPS Board of Education on July 23, 2024. At the July 23, 2024 board meeting, the MNPS Board of Education voted to deny the amended application of LSSE.

Commission Review Committee's Evaluation of the Application

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

Name	Title
Erin Conley	External Reviewer
Halli Faulkner	External Reviewer
Beth Figueroa	Commission Staff
Kristina McInerney	External Reviewer
Nate Parker	Commission Staff

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

Sections	Ratings
Academic Plan and Design	Meets or Exceeds Standard
Operations Plan and Capacity	Meets or Exceeds Standard
Financial Plan and Capacity	Meets or Exceeds Standard
Portfolio Review and Performance Record	Meets or Exceeds Standard

The Review Committee recommends the approval of the amended application for LSEE based on the applicant's comprehensive and well-developed plans for academics, operations, and finance, coupled with the LEAD network's demonstrated track record of success in school management and student achievement.

The Academic Plan and Design presented by the applicant meets or exceeds standard because the application presents a well-developed academic plan, reflective of extensive planning and a thoughtful approach to expanding into the elementary grades. The plan prioritizes a cohesive K-12 approach, data-driven instruction, and robust support for all learners, including those with diverse needs. The experienced team will utilize proven data analysis tools to monitor student progress and inform instruction. A commitment to inclusivity is evident in the comprehensive support provided for special populations, including co-teaching models, resource classes, and individualized learning plan ("ILP") trackers. Furthermore, the applicant has cultivated strong community partnerships and engagement initiatives, to foster a cohesive K-12 educational environment within the southeast Nashville community.



The applicant's Operations Plan and Capacity meets or exceeds standard due to the network's extensive experience in successfully launching and managing schools as evidenced within the application. With a strong leadership team and a well-structured governing board, the school is positioned to effectively address all essential operational aspects. LEAD Southeast Elementary School prioritizes attracting and retaining high-quality educators by offering competitive compensation, collaborating with teacher preparation programs, and providing comprehensive professional development that includes individualized support and ongoing coaching. The network's proven experience in navigating the complexities of facility acquisition and renovation within the Nashville area ensures a smooth and efficient process for securing a suitable learning environment.

The Financial Plan and Capacity meets or exceeds standard because the plan exhibits a thorough understanding of responsible resource management and benefits from the LEAD network's strong financial foundation and extensive experience. The budget is aligned with the school's mission and academic plan, prioritizing investments such as competitive staff compensation, high-quality instructional materials, and comprehensive professional development for educators. The network's history of fiscal management, including expertise in budgeting, fundraising, and grant administration, further strengthens the school's financial outlook. The budget also includes a diverse range of funding sources, including philanthropic support, a line of credit, and access to budget reserves, demonstrating a commitment to long-term financial viability.

Lastly, the Portfolio Review and Performance Record meets or exceeds standard due to the applicant demonstrating a track record of success in both school operations and academic achievement. LEAD has fostered academic growth across its schools, many of which have earned TVAAS Level 5 and Reward School status. Data further reveals that LEAD schools have outperformed neighboring schools in recent years, highlighting the effectiveness of their data-driven instruction and robust intervention strategies. Although the network faced challenges with one turnaround school, LEAD has demonstrated a capacity for reflection and adaptation, proactively addressing issues, and refining its practices to ensure continuous improvement. This commitment to growth, coupled with successful turnarounds of other schools, positions LEAD Southeast Elementary for ongoing success and reinforces the network's ability to effectively manage and improve schools.

For the aforementioned reasons, the Review Committee found that the sponsor did meet or exceed the standard for approval based on the department's scoring rubric.

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

Public Hearing

Pursuant to statute⁵ and Commission Policy 2.000, a public hearing chaired by the Executive Director was held on September 17, 2024. MNPS's presentation at the public hearing focused on the district's review process and why the applicant was denied by the MNPS Board of Education. Representatives from MNPS indicated that LSEE's amended application was denied due to several concerns. Primarily, the MNPS Review Committee found that the application did not adequately address the academic underperformance and enrollment challenges experienced at LEAD Brick Church ("Brick Church"), a school previously operated within the network. The district also expressed concerns about the LEAD network's financial plan, noting the absence of capital investments in the budget and the potential for a net deficit. Lastly, MNPS representatives highlighted concerns regarding the applicant's capacity to effectively serve the targeted student population and inconsistencies in the network's academic performance. These

⁵ T.C.A. § 49-13-108(5)(b)(i).

concerns, along with questions surrounding the transition from a middle school to an elementary school model, led the MNPS Board of Education to deny the application.

In the sponsor's opening statement, the chief executive officer ("CEO") of LEAD Public Schools provided a high-level overview of the LEAD network and then spoke about why the network desires to expand to offer an elementary school option. The goal of the proposed expansion is to provide families with a consistent K-12 pathway. LEAD families desire an elementary option within the LEAD community, with the sponsor citing that eighty-seven current LEAD Southeast families and fifty-six additional families located in the southeast Nashville community have expressed interest in enrolling their elementary child in a LEAD elementary school. Students regularly enter LEAD middle schools two or more grade levels behind, and the sponsor stated that having strong LEAD elementary schools will improve the readiness for middle school. Despite incoming deficits, LEAD presented data demonstrating that LEAD students continue to perform better every year, as shown in a chart of TCAP scores for different subjects. LEAD schools, specifically LEAD Neely's Bend, LEAD Cameron, and LEAD Academy, consistently outperform their district-operated peer schools. The operator then addressed the recent closure of Brick Church, stating that the reasons to expand to an elementary school are a direct result of Brick Church. LEAD wants to reach students earlier in their educational careers, and while they are no longer operating Brick Church, the network is proud that it was the highest-performing school in the Whites Creek cluster for the 2023-24 school year. The sponsor closed by stating that the Antioch cluster represents the fastest-growing enrollment in MNPS, and as a result, the cluster is currently experiencing a range of over-utilization across existing schools. As a result of this growth, the Metropolitan Nashville City Council voted in August 2024 on the purchase of properties for a new elementary school in Antioch. This rapid growth is further rationale to support the addition of an elementary school in the southeast area.

During questioning by the Commission, MNPS was asked to clarify the primary reasons for the denial of the application, apart from the closure of Brick Church and the network's financial margin. The district responded that other deficiencies were noted particularly impacting the network's academic performance record. The district's review team noted concerns in the amended application about how the applicant only provided data for economically disadvantaged students, did not show evidence of raising student achievement levels, and that other network schools had concerning academic performance. Furthermore, the amended application did not provide a detailed causation about the low performance of Brick Church. MNPS was asked how they assessed the long-term enrollment potential for a new LEAD elementary school in the targeted cluster. The district expressed concerns that the application did not provide an exact location for the proposed school, and the district's assessment was based on the LEAD network school's utilization, stating LEAD Southeast Middle School is only 89% utilized. MNPS was also asked to clarify what specific financial metrics or standards were used to determine that the projected net cash position is insufficient to meet acceptable standards for a growing network. They responded that while the network's net cash flow was positive, there were remaining concerns regarding the network's reserve levels given the closure of Brick Church. They also stated that while LEAD is in good financial health and demonstrated strong liquidity, the net income level of \$186k seemed relatively small for an organization of their size. During questioning, MNPS stated that the operator is meeting financial performance standards on the district's annual performance framework.

The Commission then questioned the sponsor about the demographics and unique strengths and challenges of the proposed school. The sponsor responded that in southeast Nashville, LEAD has found that many Middle Eastern families want a supportive school environment, and there is a broader geography of families attending LEAD Southeast Middle School. The network's elementary school team has hired staff with a background focusing on newcomers so they can meet the needs of the community. When questioned about the network's capacity to open a new elementary school, the sponsor responded that they have hired individuals onto the network team with elementary experience, and they have increased their financial position to support new school growth. Additionally,

LEAD explained that they have determined the proposed elementary school has sufficient interest from prospective families based on the survey data collected. In the spring of 2024, the network conducted a survey asking if existing families would be interested in enrolling in a LEAD-operated elementary school. From the network's existing families, they have a list of approximately 300 families interested in enrolling and over 600 families in support. The network then spoke to enrollment capacity challenges in Antioch. Even without population growth, the movement of fifth grade students to elementary creates capacity challenges for existing schools within the area, and parents are currently exercising choice outside of their zone to attend LEAD Southeast Middle. The sponsor anticipates this trend to continue if the LEAD Southeast Elementary application is approved.

The public hearing concluded with closing statements by both parties and the receipt of thirteen in-person comments, with five speaking in support of MNPS and eight speaking in support of LSEE. The Commission also accepted written comments, and the Commission received twenty-five written comments, with five writing in support of MNPS and twenty writing in support of LSEE.

Analysis

State law requires the Commission to review the decision of the local board of education and determine if the application "meets or exceeds the metrics outlined in the Tennessee Department of Education's application-scoring rubric and,"⁶ whether "approval of the application is in the best interests of the students, LEA, or community."⁷ In addition, pursuant to T.C.A. § 49-13-108, the Commission adopted the State Board of Education's Quality Charter Authorizing Standards set forth in State Board Policy 6.111 and utilizes these standards to review charter applications received upon appeal. In making my recommendation to the Commission, I have considered the Review Committee's Recommendation Report, the documentation submitted by both the sponsor and MNPS, the arguments made by both parties at the public hearing, and the public comments received by Commission staff and conclude as follows:

The Review Committee's report and recommendations are thorough, citing specific examples in the application and referencing information gained in the capacity interview in support of its findings. For the reasons explicated in the report, I agree that the LSEE amended application did rise to the level of meeting or exceeding the standards required for approval.

I agree with the Review Committee that the sponsor's academic plan meets the standard for approval. The LEAD network is experienced in striving toward academic success and developing plans and strategies that close achievement gaps in the targeted neighborhoods. I find the sponsor's plan to introduce a full K-12 continuum is a strength, and I believe that approval of the LEAD Southeast Elementary application is a direct response to the parent demand for this option. The network has been committed to building out its academic model to serve elementary school students for several years, including hiring experienced staff to support implementation and selecting curriculum aligned to Tennessee state standards. There is a clear vision for this sponsor's academic plan and the community they intend to serve.

Another strength of the sponsor's academic plan is the enrollment plan for LEAD Southeast Elementary. The sponsor is a staple in the south Nashville community with an existing middle and high school. The network is uniquely positioned to open an elementary school based on its deep understanding and trust within the community of southeast Nashville. The sponsor has a matriculation agreement within the existing Southeast Middle and High School campuses, and I believe that approval of this amended application will further the overall mission, vision, and goals of the sponsor. They have established partnerships and community support that will aid in reaching their enrollment

⁶ T.C.A. § 49-13-108(5)(E).

⁷ *Id.*

targets, and the opening of the elementary school will complete the creation of a K-12 continuum for the community. The sponsor understands the highly diverse community that LEAD Southeast Elementary would serve, and the sponsor has already established a foundation within the community that it can easily build upon. The sponsor is positioned to lean on its knowledge of outreach and community connection to recruit and attract new elementary students. With any newly opening school, there is always the possibility of under-enrollment post authorization, but I believe this sponsor is poised to meet that challenge and has the contingencies in place should enrollment not materialize.

The sponsor also has a strong operations plan based on a well-established and experienced network team and governing board. The governing board is engaged and has a clear, thoughtful plan for expansion into elementary school grades. The network has hired individuals with elementary school experience to oversee the opening of a new elementary school. The network has a track record of success and has a clear plan to recruit and retain quality teachers for LEAD Southeast Elementary. The sponsor's compensation plan is competitive and grounded in the Nashville market, and the network has established partnerships to support the recruitment of qualified teachers for the school.

The sponsor spoke to facility plans during the capacity interview and public hearing, and the network staff walked through the process and timeline for finalizing a facility for opening in the fall of 2025. The sponsor has been working with agents and brokers to identify potential facilities and testified to being prepared to enter negotiations immediately after authorization. As the importance of securing a facility for the establishment of a new public charter school is paramount, I am encouraged by the sponsor's testimony that if there is no facility secured by January 15, they would utilize their statutory right to delay one academic year to minimize the impact on families in the area.

The sponsor has a strong financial record and is prepared to open a new elementary school. The network has a track record of positive fiscal management, and the sustainability of the network budget is not dependent on the approval of this amended application. MNPS testified that the network has met the standards of the district's financial performance metrics, and the district has not cited any concerns with the network's financial position that merit denial of the application. After reviewing the detailed financials, I do not have any concerns regarding the immediate start-up costs or long-term sustainability of the sponsor's fiscal ability.

Finally, I found the past performance section of the application to meet the standard for approval. The sponsor has been a part of the educational landscape in Nashville since 2007. In that time, the sponsor has achieved academic success and worked with families to close achievement gaps for the students it serves, and there is evidence that the LEAD network makes intentional decisions to support the academic success of its students. The network also has the foresight to adjust its plans in response to the challenges it faces. Throughout the public hearing, MNPS challenged the capacity of the network to expand, often referencing the non-renewal of LEAD Brick Church. The district's evidence appeared to hold this non-renewal as the primary reason for the denial of the amended application. However, the academic performance of Brick Church, as well as the surrounding district-operated schools, is a topic the Commission extensively evaluated in February 2024. At this meeting, the Commission discussed that LEAD Public Schools, as an entity, has been successful both as a turnaround charter operator with LEAD Neely's Bend and LEAD Cameron and as a new start charter operator with LEAD Southeast and LEAD Academy. Moreover, the district has chosen to approve the renewals of multiple LEAD-operated charter schools since it first approved the network to open in 2007.

While I recommended that the Commission not approve a new charter agreement for LEAD Brick Church, throughout my recommendation I acknowledged the network's intentional efforts within Nashville that have improved academic outcomes for students. There is clear data throughout the record that LEAD Public Schools has



been a value-add to the Nashville community and, with four of the five schools under MNPS, a value-add to the district. The district's argument regarding the performance of LEAD Public Schools was concerning. Within the totality of the network's data, there is clear evidence of academic success within the network: schools have achieved Level 5 TVAAS scores, schools have exited the Priority school list, and schools have achieved Reward school status. Many of these achievements occurred in schools authorized by MNPS. LEAD has demonstrated itself to be a reflective operator, willing to take feedback and make improvements. Rather than the closure of Brick Church being seen as a negative, I appreciate the lessons that LEAD has learned from Brick Church that it intends to apply to its operations in the future. This is the sign of a quality charter school operator.

Any authorized public charter school is entrusted with the great responsibility of educating students and a significant amount of public funds. For these reasons, the Commission expects that only those schools that have demonstrated a high likelihood of success and meet or exceed the required criteria in all areas will be authorized. LEAD Public Schools can provide a K-12 educational experience in a growing area of Nashville. For the reasons expounded on in this report, I recommend that the Commission approve the LSEE amended application.

CONCLUSION

For these reasons, and for the reasons stated in the Review Committee Recommendation Report attached hereto as **Exhibit A**, I do believe that the decision to deny the amended application for LSEE was contrary to the best interests of the students, the LEA, or community. Therefore, I recommend that the Commission overturn the decision of the MNPS Board of Education to deny the amended application for LSEE.

A handwritten signature in black ink that reads "Tess Stovall". The signature is fluid and cursive, with the first letters of the first and last names being capitalized and prominent.

Tess Stovall, Executive Director
Tennessee Public Charter School Commission

10/17/24
Date



TENNESSEE
PUBLIC CHARTER SCHOOL COMMISSION

EXHIBIT A

Charter Application Review Committee Recommendation Report

October 17, 2024

School Name: LEAD Southeast Elementary

Sponsor: LEAD Public Schools

Proposed Location of School: Metro Nashville Public Schools

Evaluation Team:

- Erin Conley
- Halli Faulkner
- Beth Figueroa
- Kristina McInerney
- Nate Parker

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



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Introduction

Tennessee Code Annotated (“T.C.A.”) § 49-13-108 allows the sponsor of a public charter school to appeal the denial of an application by the local board of education to the Tennessee Public Charter School Commission (“Commission”). In accordance with T.C.A. § 49-13-108, the Commission shall conduct a de novo, on the record review of the proposed charter school’s application, and the Commission has adopted national and state quality authorizing standards to guide its work. As laid out in Commission Policy 3.000 – Core Authorizing Principles¹, the Commission is committed to implementing these authorizing standards that are aligned with the core principles of charter school authorizing, including setting high standards for the approval of charter schools in its portfolio.

In accordance with T.C.A. § 49-13-108, the Commission adopted Commission Policy 2.000 – Charter School Appeals. The Commission has outlined the charter school appeal process to ensure the well-being and interests of students are the fundamental value informing all Commission actions and decisions. The Commission publishes clear timelines and expectations for applicants, engages highly competent teams of internal and external evaluators to review all applications, and maintains rigorous criteria for approval of a charter school. In addition, the Commission plans to evaluate its work annually to ensure its alignment to national and state standards for quality authorizing and implements improvement when necessary.

The Commission’s charter application review process is outlined in T.C.A. § 49-13-108, Commission Policy 2.000 – Charter School Appeals, and Commission Policy 2.100 – Application Review. The Commission assembled a charter application review committee comprised of highly qualified internal and external evaluators with relevant and diverse expertise to evaluate each application. The Commission provided training to all committee members to ensure consistent standards and fair treatment of all applications.

Overview of the Evaluation Process

The Commission’s charter application Review Committee developed this recommendation report based on three key stages of review:

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

This recommendation report includes the following information:

1. Summary of the Application: A brief description of the applicant’s proposed academic, operations, financial plans, and performance review.

¹ All Commission rules and policies may be found on the Commission’s [website](#).

2. Summary of the Recommendation: A brief summary of the overall recommendation for the application.
3. Analysis of each section of the application: An analysis of the four sections of the application and the capacity of the team to execute the plan as described in the application.
 - a. Academic Plan and Design: school mission and vision; enrollment summary; academic focus and plan; academic performance standards; assessments; school calendar and schedule; special populations; school culture and discipline; recruitment and enrollment; parent and community engagement and support; and the capacity to implement the proposed plan.
 - b. Operations Plan and Capacity: governance; start-up plan; facilities; personnel/human capital; professional development; insurance; transportation; food service; additional operations; network vision, growth plan and capacity; network management; network governance; network wide personnel and human capital projections; and the capacity to implement the proposed plan.
 - c. Financial Plan and Capacity: planning and budget worksheet; budget narrative; network financial plan; and the capacity to implement the proposed plan.
 - d. Portfolio Review and Performance Record: past performance.

The Commission's charter application Review Committee utilized the Tennessee Department of Education's Application to Create a Public Charter School Scoring Criteria ("the rubric"), which is used by all local boards of education when evaluating an application. The rubric states:

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

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

Rating	Characteristics
Meets or Exceeds Standard	The response reflects a thorough understanding of key issues. It clearly aligns with the mission and vision of the school. The response includes specific and accurate information that shows thorough preparation.
Partially Meets Standard	The response meets the criteria in some respects but lacks sufficient detail and/or requires additional information in one or more areas.
Does Not Meet Standard	The response is incomplete; demonstrates lack of preparation; does not align with the mission and vision of the school; or otherwise raises significant concerns about the viability of the plan or the applicant's ability to carry it out.

Summary of the Application

School Name: LEAD Southeast Elementary

Sponsor: LEAD Public Schools

Proposed Location of School: Metro Nashville Public Schools

Mission: To equip every student with the knowledge and skills necessary for success in both college and life.²

Number of Schools Currently in Operation by Sponsor: The sponsor currently has four operating charter schools authorized by Metro Nashville Public Schools and one charter school authorized by the Commission.

Proposed Enrollment:³

Grade Level	Year 1: 2025-2026	Year 2: 2026-2027	Year 3: 2027-2028	Year 4: 2028-2029	Year 5: 2029-2030	At Capacity:
K	60	60	60	60	60	60
1	35	60	60	60	60	60
2	35	35	60	60	60	60
3		35	35	60	60	60
4			35	35	60	60
5				35	35	60
Totals	130	190	250	310	335	360

Brief Description of the Application:

The sponsor, LEAD Public Schools ("LEAD"), is proposing to open a charter school in Davidson County, Tennessee and serve students in kindergarten through fifth grade when fully built out. The school, LEAD Southeast Elementary, is a new-start school and would be the sixth school for the sponsor. The school intends to operate in the southeastern communities of Davidson County to equip every student with the knowledge and skills necessary for success in both college and life.⁴ The school proposes to offer an all-encompassing educational model within the larger LEAD network that emphasizes the belief that every child can excel given the right opportunities and supports and to provide an opportunity for students in this area an additional school option.

The proposed school will be governed by LEAD Public Schools, whose fourteen-member board possesses the diverse background and expertise necessary to support both the effective and efficient operation of the network as a whole and the individualized needs of each school. In Year 0, LEAD Southeast Elementary budgeted \$350,000 in revenue from previously raised unrestricted philanthropy and projects \$338,352 in expenses for the school. LEAD Southeast Elementary projects the school will have \$2,598,966 in revenue and \$2,563,258 in expenses in Year 1, resulting in a balance of \$47,356. By Year 5, the school projects to have \$6,185,017 in revenue and \$5,985,388 in expenses, resulting in a positive ending fund balance of \$626,619.⁵ The school anticipates that 30% of the student population will qualify as economically disadvantaged, 10% of the student population will be students with disabilities, and 50% of the student population will be English learners ("EL").⁶

² LEAD Southeast Elementary Amended Application, pg. 12

³ LEAD Southeast Elementary Amended Application, pg. 36

⁴ LEAD Southeast Elementary Amended Application, pg. 12

⁵ LEAD Southeast Elementary amended budget, pg. 29

⁶ Ibid, p 36

Summary of the Evaluation

The Review Committee recommends the approval of the amended application for LEAD Southeast Elementary because the applicant has demonstrated the capacity to successfully launch and operate high-quality schools. Their comprehensive academic plan, strong operational framework, and sound financial planning, coupled with a proven track record of student achievement and fiscal responsibility, ensure they meet or exceed the standards in all key areas.

The Academic Plan and Design presented by the applicant meets or exceeds standard due to LEAD's extensive planning related to expanding to the elementary grade band and the network's strong commitment to academic success. This commitment is evident in their well-developed plan, which includes a cohesive K-12 approach, a strong focus on data-driven instruction, comprehensive support for special populations, and robust community engagement initiatives. The network's experienced team will implement a data-driven approach, utilizing tools like NWEA MAP and FastBridge, to monitor student progress and inform instruction. Furthermore, LEAD Southeast Elementary demonstrates a commitment to inclusivity by providing comprehensive support for special populations, including co-teaching models, resource classes, and individualized learning plan ("ILP") trackers. Finally, the applicant has fostered strong community support through partnerships, engagement initiatives, and a clear articulation agreement with existing LEAD middle and high schools, ensuring a smooth transition for students and a cohesive educational environment.

The applicant's Operations Plan and Capacity meets or exceeds standard due to LEAD Southeast Elementary's comprehensive approach and demonstrated experience in successfully launching schools. Benefitting from a committed and experienced leadership team with a proven track record, the plan addresses all essential operational aspects, demonstrating a clear understanding of the requirements and a realistic approach to implementation. The leadership team possesses extensive experience in education, and this expertise is further bolstered by a well-structured governing board, demonstrating a commitment to thoughtful oversight and guidance. Moreover, LEAD Southeast Elementary prioritizes attracting and retaining high-quality teachers through competitive compensation packages, partnerships with teacher preparation programs, and a comprehensive professional development plan that includes ongoing coaching and individualized support. Finally, LEAD Southeast Elementary has demonstrated experience in navigating the complexities of facility acquisition and renovation in the Nashville area.

The Financial Plan and Capacity presented by LEAD Southeast Elementary meets or exceeds standard due to its realistic and sustainable budget, supported by the strong financial foundation and experience of the LEAD network. The budget aligns with the school's mission and academic plan, strategically allocating resources to support key priorities such as competitive staff compensation, high-quality instructional materials, and comprehensive professional development. LEAD Southeast Elementary benefits from the network's proven track record of successful fiscal management, including experience with budgeting, fundraising, and grant administration. Furthermore, the network's commitment to financial viability is evident in its diverse funding sources, including philanthropic fundraising, a line of credit, and access to budget reserves. This strong financial health, coupled with a history of clean audits and compliance with fiscal requirements, ensures that LEAD Southeast Elementary has the capacity to launch successfully and maintain long-term sustainability.

Lastly, the Portfolio Review and Performance Record meets or exceeds standard, as LEAD demonstrates a history of success in school operations and fiscal management. Evidenced by clean audits and successful operation under multiple authorizers, LEAD has consistently achieved academic growth, earning TVAAS Level 5 and Reward school status for many of its schools. Furthermore, TVAAS and success rate data show that LEAD network schools have outperformed neighboring schools in recent years. This success is rooted in a data-driven approach to

instruction and a robust intervention process, ensuring that LEAD Southeast Elementary will prioritize student growth and academic success. While facing challenges with one turnaround school, LEAD has demonstrated a capacity for reflection and adaptation, taking steps to address issues and improve practices. This commitment to continuous improvement, along with the successful turnaround of other schools, positions LEAD Southeast Elementary for continued success and demonstrates the network's capacity to effectively manage and improve schools.

Summary of Section Ratings

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

Sections	Ratings
Academic Plan and Design	Meets or Exceeds Standard
Operations Plan and Capacity	Meets or Exceeds Standard
Financial Plan and Capacity	Meets or Exceeds Standard
Portfolio Review and Performance Record	Meets or Exceeds Standard

Analysis of the Academic Plan and Design

Rating: Meets or Exceeds Standard

Strengths Identified by the Committee

The applicant's Academic Plan and Design meets or exceeds standard because LEAD Southeast Elementary demonstrates a strong commitment to academic success, evidenced by a well-developed plan that includes a cohesive K-12 approach, a strong focus on data-driven instruction, support for special populations of students, and robust community engagement initiatives that foster a supportive learning environment.

LEAD Southeast Elementary's application presents a strong academic plan reflective of extensive planning and intentionality for serving the elementary grade band, as characterized by its K-12 continuum, experienced team, and data-driven approach. The network envisions a comprehensive K-12 choice system serving the southeast Nashville community, building upon LEAD's successful track record of operating schools in Nashville since 2007. As demonstrated in the capacity interview, the network team possesses the expertise to implement a robust academic plan. LEAD Public Schools has a successful approach to RTI², ensuring students receive daily support outside of core instruction, which allows for sufficient remediation to succeed. Leadership and school teams hold data review meetings every six weeks to review student progress and outcomes in alignment with their robust assessment system, which includes NWEA MAP, FastBridge, and TNReady-aligned interim assessments. The network leverages their intervention system, along with this student data, to make data-driven decisions at both the school and network level, including collaborative goal setting and adjustments to curriculum and instruction. This multifaceted approach ensures a focus on student outcomes and allows for collaborative goal setting and revision. Additionally, the application highlights the network's commitment to using curriculum aligned to state standards, such as EL Education for English language arts ("ELA") and Illustrative Mathematics for math. The network will then use student data to ensure this curriculum choice is high-quality, demonstrating a commitment to providing a strong instructional foundation for all students.

LEAD Southeast Elementary presents a robust plan for serving special populations of students, demonstrating a commitment to inclusivity and comprehensive support. During the capacity interview, the LEAD team emphasized this commitment by describing how the network would support the school team in implementing high-leverage instructional strategies at the Tier 1 level that will help all students. The school plans to achieve this through co-teaching models and resource classes, striking a balance of what individual students need. The school also demonstrates a commitment to hiring qualified personnel, including dually endorsed teachers for both general education and EL instruction. Both the application and capacity interview highlighted the careful selection of curricula, with built-in scaffolds for diverse learners, and emphasized the use of ILP trackers to ensure teachers understand and can support each student's needs. Based on the projected percentage of EL students, this comprehensive approach, combined with a focus on family engagement and clear procedures for ILP meetings and goal tracking, indicates a strong commitment to serving the diverse needs of their student population.

LEAD Southeast Elementary demonstrates strong community support, partnerships, and engagement, laying the groundwork for a thriving school community. Their application includes letters of support from parents and community organizations, highlighting a recognized need for their program in southeast Nashville. LEAD Southeast Elementary has employed a multi-faceted approach to community engagement, including mailers, canvassing, parent meetings, and a targeted social media campaign. During the capacity interview, the proposed school team and network emphasized their commitment to building relationships with families through events like "Donuts with Dad" and "Muffins with Mom," fostering a welcoming and inclusive atmosphere at their already existing schools. LEAD Southeast Elementary's dedication to partnerships and building out their matriculation pattern is evident in their



articulation agreement with existing middle and high schools, ensuring a smooth transition for students and a cohesive educational environment. This agreement supports the academic growth of younger students and also addresses the challenges that the network is experiencing in their middle schools with students entering multiple grade levels behind in reading and math. This ongoing commitment to community engagement includes collaborating with local partners, attending neighborhood meetings, and hosting informational sessions for families, ensuring that LEAD Southeast Elementary is well-prepared to meet enrollment targets and effectively serve the families of southeast Nashville.

Analysis of the Operations Plan and Capacity

Rating: Meets or Exceeds Standard

Strengths Identified by the Committee

The applicant's Operations Plan Design and Capacity meets or exceeds standard because LEAD Southeast Elementary benefits from a committed and experienced leadership team, a well-structured governing board, and a proven operational framework successfully implemented across their existing network of schools. Their comprehensive plan addresses all essential operational aspects, demonstrating a clear understanding of the requirements and a realistic approach to implementation.

LEAD Southeast Elementary exhibits a strong commitment to effective leadership and governance. The leadership team possesses extensive experience in education, with a proven track record of success in the LEAD network, as evidenced by their consistent achievement of TVAAS Level 5 growth and recognition as Reward schools. LEAD Southeast Elementary has proactively assembled a highly qualified and experienced team to lead their elementary school expansion efforts. This team possesses a diverse range of expertise, including instructional leadership, curriculum development, special populations support, and literacy instruction. Their existing knowledge of the LEAD network and its successful practices ensures a strong foundation for the new elementary school. During the capacity interview, the leadership team clearly articulated their vision for the school and demonstrated a deep understanding of the needs of their students. The longevity within the network ensures a deep understanding of the LEAD model and a commitment to its continued success. This experienced team is further bolstered by a well-structured governing board, demonstrating a commitment to thoughtful oversight and guidance. The board's expertise in education, finance, and community engagement ensures that LEAD Southeast Elementary will benefit from knowledgeable and dedicated leadership at all levels. The board's commitment to the new proposed school is evident in their active participation, including the Board Chair's presence and engagement during the capacity interview. This combination of experienced leadership and dedicated governance creates a strong foundation for LEAD Southeast Elementary.

LEAD Southeast Elementary prioritizes attracting and retaining high-quality teachers, as evidenced by the network's comprehensive approach to professional development and human capital management. Their professional development plan includes ongoing coaching for all teachers and prioritizes training in areas such as foundational literacy skills, special populations support, and cultural competency. During the capacity interview, LEAD representatives emphasized their commitment to providing individualized support and feedback to teachers, ensuring they have the resources and guidance necessary to excel. Furthermore, LEAD offers competitive compensation packages and has established partnerships with programs like iTeach and University of Tennessee at Knoxville to actively recruit certified teachers in high-need areas, such as special education and EL. Their commitment to investing in their teachers not only strengthens the instructional program outlined within the application but also fosters a supportive and growth-oriented environment conducive to both teacher and student success.

The LEAD network demonstrates experience in opening schools and has successfully launched multiple schools in the Nashville area. This experience provides them with valuable knowledge of the Nashville market, building codes, and the complexities of facility acquisition and renovation. Their due diligence for the proposed elementary school includes working with brokers and consultants to identify properties, considering both short-term, move-in ready locations and spaces that may require renovation. They have visited potential facilities with their chief operating officer and are prepared to move forward with a letter of intent ("LOI") for a location upon authorization. This proactive approach and thorough due diligence, combined with their demonstrated experience, indicates a capacity to secure a suitable facility for the proposed school.

Analysis of the Financial Plan and Capacity

Rating: Meets or Exceeds Standard

Strengths Identified by the Committee

The applicant's Financial Plan and Capacity meets or exceeds standard because LEAD Southeast Elementary presents a realistic and sustainable budget, supported by the strong financial foundation and experience of the LEAD network. Their proven track record of fiscal management, access to philanthropic funds and grant opportunities, and demonstrated capacity to effectively manage resources ensures the financial viability of the proposed school.

LEAD Southeast Elementary presents a fiscally responsible and sustainable budget, demonstrating a strong understanding of financial management principles. The budget aligns with the school's mission and academic plan, allocating resources strategically to support key priorities, including class sizes, high-quality instructional materials, and comprehensive professional development. Their detailed projections account for both anticipated revenues and expenditures, including realistic enrollment figures and competitive salary and benefit packages for staff, targeted to increase recruitment and retention efforts. This attention to detail ensures that the budget accurately reflects the school's operational needs and demonstrates a commitment to responsible resource allocation.

Furthermore, LEAD Southeast Elementary benefits from the strong financial foundation and experience of the LEAD network and staff. As an established network of schools, LEAD has a proven track record of successful fiscal management, including experience with budgeting, fundraising, and grant administration. During the capacity interview, LEAD representatives emphasized their conservative approach to budget projections, highlighting their efforts to reduce non-instructional costs when necessary and secure diverse funding sources. Their commitment to financial viability is further demonstrated by their \$1.9 million in annual philanthropic fundraising, \$1 million line of credit, and access to budget reserves. These combined strengths ensure that LEAD Southeast Elementary has the financial capacity to not only launch successfully but also maintain long-term sustainability.

LEAD's strong financial health is further evidenced by their history of clean audits and consistent compliance with fiscal requirements. During the capacity interview, the LEAD team highlighted their commitment to financial transparency and accountability, emphasizing their dedication to responsible resource management. Their experience operating within the BEP and transition to TISA funding frameworks demonstrates an understanding of the complexities of school finance in Tennessee. These factors, combined with their strong financial metrics and commitment to sound fiscal practices, provide further assurance of LEAD Southeast Elementary's financial viability and capacity for long-term success.

Analysis of the Portfolio Review and Performance Record

Rating: Meets or Exceeds Standard

Strengths Identified by the Committee

The applicant's Portfolio Review and Performance Record meets or exceeds standard because LEAD demonstrates a strong track record of success in school operations and fiscal management, evidenced by their clean audits and experience operating successfully under multiple authorizers since 2007. Despite challenges with one turnaround school, LEAD has consistently achieved academic growth, earning TVAAS Level 5s and Reward school statuses, demonstrating their capacity to effectively manage and improve schools.

LEAD Southeast Elementary's application showcases a strong record of academic achievement and continuous improvement. The LEAD network has consistently demonstrated its ability to drive student growth, as evidenced by their schools' TVAAS Level 5 ratings and recognition as Reward schools. Additionally, TVAAS and success rate data presented within the application demonstrates that in both 2022 and 2023, the LEAD network schools mostly outperformed neighboring zoned schools. This success is rooted in their data-driven approach to instruction and robust intervention process. During the capacity interview, LEAD representatives highlighted their commitment to ongoing analysis of student data to identify areas of strength and weakness, allowing them to adjust instruction and provide necessary support. This commitment to data-informed decision-making ensures that LEAD Southeast Elementary will prioritize student growth and academic success, much like the other schools operated by the network.

Furthermore, LEAD has demonstrated a capacity for reflection and adaptation, learning from past challenges to improve its practices and ensure future success. While their efforts to turnaround Brick Church Middle School did not fully achieve the desired outcomes within the needed timeframe, the school still demonstrated growth in both ELA and math TNReady scores, particularly in their final year of operation under LEAD. LEAD acknowledges that leadership and teacher retention were significant challenges at LEAD Brick Church, and they have taken steps to address these issues by hiring top academic leaders for their schools and offering bonuses to retain teachers. This experience, along with the successful turnaround of LEAD Neely's Bend Middle School and LEAD Cameron, highlights LEAD's commitment to continuous improvement and their ability to effectively manage schools, even amidst challenges. This commitment positions LEAD Southeast Elementary for continued success and demonstrates their capacity to effectively manage and improve schools.



Evaluation Team

Erin Conley serves as an expert reviewer for a number of charter school authorizers across the country. Over the last 14 years in the field of education, she has served in roles focused on survey development, data analytics and visualization, research, board development, compliance, school operations, and policy analysis. Erin has expertise in charter authorization and laws that impact charters and networks. Erin began her career teaching in the Chicago Public School district. She has a Bachelor of Arts in English and Secondary Education from Michigan State University and a Master's in Public Policy from Vanderbilt University with a focus on K-12 education policy.

Halli Faulkner is a seasoned education policy professional and a former middle school English teacher. Most recently, as the Senior Director of State and Federal Policy for the American Federation for Children, Halli supported education leaders in 18+ states in creating high-quality law and policies to empower students and families. Halli earned her law degree from the George Washington University Law School and master's degree in secondary education from Loyola Marymount University's Graduate School of Education.

Beth Figueroa is the Director of Authorizing for the Tennessee Public Charter School Commission. She is a Certified Public Accountant and has spent the last 15 years specializing in school finance and charter school oversight. Before working at the Commission, Beth worked as an administrator and charter school authorizer in California. She has also had the opportunity to serve as the Chief Business Officer of a charter school, an Executive Director of Fiscal Services for a school district with an annual budget of over \$500 Million, and an auditor of charter schools and non-profit organizations. She earned her Master of Business Administration degree from California Baptist University, where she also received her B.S. in Business Administration.

Kristina McInerney is a special education teacher with seven years of experience. She earned her bachelor's degree in K-12 multi-categorical special education, with a minor in Spanish, from Coastal Carolina University. Kristina also holds a master's degree in educational leadership from Carson Newman University. Throughout her career, she has been dedicated to supporting students with diverse learning needs, drawing on her expertise in special education and her leadership training to foster inclusive and effective learning environments.

Nate Parker is the Director of School Programs & Supports at the Tennessee Public Charter School Commission. Prior to his role at the Charter Commission, Nate served the State of Tennessee as a Federal Programs & Policy Coordinator for the State Board of Education, Director of Charter Schools for the Department of Education, and most recently as Senior Director of School Choice for the department. His state level experience worked to support charter school authorizing and the expansion of high-quality school choice options for Tennessee families. Before his tenure with the State of Tennessee, Nate worked over a decade in public school systems in Arizona, Connecticut, Ohio, and Tennessee. His work was primarily comprised of roles in public charter schools, including serving as a secondary history teacher and roles in instructional leadership, school leadership, and network operations. Nate holds a B.A. in Integrated Social Studies and an M.P.A. from Ohio State University and an M.Ed. with a specialization in secondary education from Arizona State University. He earned an Ed.D. in K-12 Education Policy & Leadership from Vanderbilt University where he served as an adjunct professor teaching Human Development in the Peabody College of Education.