

LEAD Southeast Elementary School

Application

Seeking to Create a Public Charter School in
the 2025-26 School Year

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Part 1 - General Information

Cover Sheet

Primary Point of Contact

Identify the primary point of contact for your application.

Barring any change, this will likely be the liaison identified in the Letter of Intent. This individual will serve as the contact for all communications, scheduling, and notices regarding your application. The primary contact is expected to ensure that any individuals involved in the sponsoring of this application receives all general communications promptly. As with all aspects of your application, the names of the primary contact will become public information.

Primary Contact Name	Adrienne Useted
Primary Contact Role	Chief Strategy Officer
Primary Contact Mailing Address	2835 Brick Church Pike
Primary Contact Email Address	Adrienne.Useted@LEADPublicSchools.org
Primary Contact Phone Number	(615) 775-5254
Primary Contact Alternate Number	n/a

School Information

Name of Proposed School	LEAD Southeast Elementary
Projected Year of School Opening under Identified Authorizer	25-26
Name of Sponsor / Sponsoring Entity	LEAD Public Schools
Name of Proposed Authorizer	Metro Nashville Public Schools
Model or focus of proposed school	Create a K-12 pathway towards success in college and in life
City or geographic community for proposed school	LEAD Southeast Community

Sponsor & School Design Team

Below, list the names, current employment, and roles of all people on the school design team, including school leader, adding lines as needed:

Full Name	Address	Current Job Title	Current Employer	Position with Proposed School
Dwayne Tucker	2835 Brick Church Pike	Chief Executive Officer	LEAD Public Schools	Chief Executive Officer
Jenny Sawyer	2835 Brick Church Pike	Director of Communications	LEAD Public Schools	Director of Communications
Ashley Montgomery	2835 Brick Church Pike	Chief Financial Officer	LEAD Public Schools	Chief Financial Officer
Mary Minich	2835 Brick Church Pike	Head of Academics/Innovations	LEAD Public Schools	Head of Academics/Innovations
Tony Majors	2835 Brick Church Pike	Chief Operations Officer	LEAD Public Schools	Chief Operations Officer
Adrienne Ussted	2835 Brick Church Pike	Chief Strategy and Growth Officer	LEAD Public Schools	Chief Strategy and Growth Officer
Nicolas Frank	2835 Brick Church Pike	Vice President of Human Resources	LEAD Public Schools	Vice President of Human Resources
Ricki Gibbs	2835 Brick Church Pike	Head of Schools (Elementary)	LEAD Public Schools	Head of Schools (Elementary)
Stephanie Jarrett-Thorpe	2835 Brick Church Pike	Principal, Elementary	LEAD Public Schools	Principal, Elementary
Ashley Wieckiewicz	2835 Brick Church Pike	Director of Student Services, Elementary	LEAD Public Schools	Director of Student Services, Elementary
Justice Riddle	2835 Brick Church Pike	Network Literacy Coordinator, Elementary	LEAD Public Schools	Network Literacy Coordinator, Elementary
Jamie Jenkins	2835 Brick Church Pike	Assistant Principal of Students	LEAD Public Schools	Assistant Principal of Students
Corey Burton	2835 Brick Church Pike	Director of Enrollment and Family Engagement	LEAD Public Schools	Director of Enrollment and Family Engagement
Eloise Alexis	2835 Brick Church Pike	Vice President of Development	LEAD Public Schools	Vice President of Development
Carlos Comer	2835 Brick Church Pike	Assistant Principal of Instruction	LEAD Public Schools	Assistant Principal of Instruction

Is the sponsor a not-for-profit organization with 501(c)(3) status?	X Yes ☐ No ☐ In Progress
If no or in progress, please explain:	

Does the proposed school intend to contract or partner with a charter management organization (CMO)?	☐ Yes X No
LEAD Southeast Elementary will be a subsidiary of LEAD Public Schools and governed by the same Board of Directors.	

Additional Application Information

Does this sponsor have charter school applications currently under consideration by any other authorizer in the United States?					☒ Yes ☐ No
<i>If yes, complete the table below, adding lines as needed</i>					
State	Authorizer	Proposed School Name	Application Due Date	Decision Date	Proposed Opening Year
TN	Metro Nashville Public Schools	LEAD Cameron Elementary	February 1, 2024	April 24, 2024	SY25-26

Application Category

Please select ONE box to indicate the category type for this application:

Category			Description
1	☐	New Start Applicant	Sponsor with no schools currently operating and/or authorized throughout the United States proposing the creation of a new school in Tennessee
2	☐	New Start Applicant Proposing Multiple Schools	Sponsor with no schools currently and/or previously operating and/or authorized in Tennessee or throughout the United States proposing the creation of two or more schools within the same application cycle.
3	☐	Out of State Sponsor	Sponsor with at least one school currently and/or previously operating outside of Tennessee and no schools currently authorized in Tennessee proposing to create a school in Tennessee.
	☒	Existing Tennessee Sponsor Proposing a New School with Change in Focus / Grade Structure	Sponsor with at least one school currently and/or previously authorized in Tennessee proposing to create a new school with a change in focus and/or grade structure from the existing school
4	☐	Existing Tennessee Sponsor Proposing to Replicate an Existing School	Sponsor with at least one school currently and/or previously operating in Tennessee proposing to start a new school with no material change in focus or grade structure from an existing school.

Required Filing Materials

Below are the required materials based on the selected category

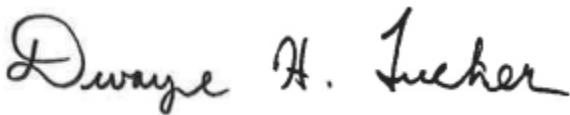
Category		Required Materials
1	New Start Applicant	See Category 1 Completeness Checklist
2	New Start Applicant Proposing Multiple Schools	See Category 2 Completeness Checklist
3	Out of State Sponsor	See Category 3 Completeness Checklist
	Existing Tennessee Sponsor Proposing a New School with Change in Focus / Grade Structure	
4	Existing Tennessee Sponsor Proposing to Replicate an Existing School	See Category 4 Completeness Checklist

Assurances

As the authorized representative of the sponsor, I hereby certify that the information submitted in this application for a charter for LEAD Southeast Elementary 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 follow all federal, state, and local laws and regulations that pertain to the operation of a public school, unless waived according to Tenn. Code Ann. § 49-13-111(p);
3. Will provide special education services for students as provided in Tenn. Code Ann. Title 49, Chapter 10, Part B of the Individuals with Disabilities Education Act, Title II of the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973;
4. 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;
5. 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;
6. 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;
7. Will comply with all provisions of the Tennessee Public Charter Schools Act, including, but not limited to
 - a. employing individuals to teach who hold a license to teach in a public school in Tennessee;
 - b. complying with Open Meetings and Open Records laws (Tenn. Code Ann. §§ 8-44-101 et seq.: 10-7-503, 504) (guidance is available from the Office of Open Records Counsel);
 - c. 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 Tenn. Code Ann. § 49-6-3003;
 - d. following state financial (budgeting and audit) procedures and reporting requirements according to Tenn. Code Ann. §§ 49-13-111, 120, and 127;
 - e. 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 Tenn. Code Ann. § 8-19-101; and
8. Will, at all times, maintain all necessary and appropriate insurance coverage.

Signature



Printed Name of Authorized Representative

Dwayne Tucker

Title of Authorized Representative

CEO

Executive Summary

In three pages or less, provide an executive summary about your proposed charter school. The executive summary should provide a concise overview of the following:

- the plan for the proposed school;
- the geographic and population considerations of the school environment;
- the challenges particular to those considerations; and
- the applicant team's capacity to successfully open and operate a high-quality school is given the above considerations.

Executive Summary: LEAD Southeast Elementary Charter School Proposal

Since 2013, LEAD Public Schools has been serving the students and families in southeast Nashville in grades 5-12 with the operation of LEAD Southeast Middle School and LEAD Southeast High School. These schools have provided a strong option for families in this area and the LEAD community welcomes the opportunity to complete our K-12 offering for this community with the addition of LEAD Southeast Elementary. During this time, LEAD has established incredibly deep ties to students, families and the broader LEAD Southeast community. It is our community's interest in a LEAD option for elementary that drives us to submit this application.



LEAD Southeast Elementary School is strategically designed as an innovative and transformative educational institution in southeast Nashville. The school's blueprint includes a rigorous academic curriculum aligned with state standards, an Ethos-based education fostering social and emotional skills, and a holistic approach emphasizing exposure to college culture, targeted interventions, and a positive, high-expectations school culture. Leveraging the success of LEAD Public Schools network, specifically LEAD Southeast, the proposed elementary school seeks to uphold and enhance the established legacy of academic excellence.

Situated in southeast Nashville, LEAD Southeast Elementary responds to the unique educational landscape. The area features a high demand for quality elementary school options, with the proposed school addressing the needs of the thriving Southeast Nashville community and responding to the MNPS ReImagined plan. The geographic location is strategically chosen to complement existing schools. For families desiring a full K-12 LEAD experience, this elementary will allow for a seamless transition to LEAD Southeast Middle and High Schools.

The educational model at LEAD Southeast Elementary centers around the belief that all students excel with appropriate support and encouragement. The academic plan consists of rigorous, standards-aligned content,

state-approved curricula, and a focus on problem-solving and critical thinking. A unique newcomer model, which has been successful in our middle school, will be extended to elementary students. LEAD's Network Support Team will provide continuous support for core content areas and special populations.

LEAD Southeast Elementary builds on existing ties with local community partners, providing essential services to families. Strong relationships with housing complexes, community centers, and various organizations facilitate holistic support. Family outreach, especially to non-English speaking parents, is prioritized through multilingual engagement strategies and a family communication platform. The proposed school actively engages with community partners and tailors outreach efforts to meet the needs of elementary students.

Challenges in this area include the lack of school capacity within local public elementary schools, especially in light of the transition of 5th grade to the elementary level. In addition, incoming 5th and 6th graders to LEAD Southeast Middle School still often show significant academic deficits and are not always fully prepared for the rigor of middle grades. LEAD Southeast Elementary aims to address this challenge by providing a high-quality local choice. The demand for LEAD Southeast Middle and High School underscores the need for a comprehensive K-12 continuum, further emphasizing the necessity of the proposed elementary school.

LEAD Southeast Elementary aligns with the overarching mission of LEAD Public Schools to prepare all students for success in college and life. The elementary school's mission emphasizes inclusivity, ensuring every student, regardless of their needs or educational level, leaves prepared for the challenges of life. The focus on social and emotional skills serves as a foundation for success beyond school, cascading into middle school and beyond.

LEAD Public Schools has demonstrated a proven track record in opening and operating high-quality schools. LEAD Public Schools, founded in 2007, has been a pivotal partner in closing the achievement gap in Davidson County for 15 years. LEAD Southeast Middle and High School, recognized for academic growth and achievements, serves as a testament to the team's capacity. With a mission focused on preparing students for success in college and life, a robust academic plan, and a commitment to social and emotional development, the team is well-equipped to establish LEAD Southeast Elementary as a beacon of academic excellence.

LEAD Public Schools has been a key partner in closing the achievement gap in Davidson County for the past 15 years. Examples of historical success include, but are not limited to, the following:

- Since assuming the charter in 2011, Cameron has been a TVAAS Level 5 school for overall growth every year. In addition, Cameron has been named a Reward School for top academic growth three times: 2013-14, 2016-17, and 2017-18.
- Since its founding, LEAD Southeast Middle and High School has been successfully preparing students for college and life. With the exception of 2020-21, LEAD Southeast Middle and High School has been a Level 5 school for overall growth every year since assuming the charter in 2012 and was named a Reward School for top academic growth in 2014-15 and 2016-17.
- In 2022, LEAD Neely's Bend was the first ASD school located in Nashville to exit the priority list.
- Graduation rates for LEAD Academy (90%) and LEAD Southeast High School (93%) reported for 2022 are higher than the district average of 82% and the state average of 88.7%.

To prepare for the launch of our elementary schools, LEAD has heavily invested in building an elementary school start up team, composed of six experienced veterans of Nashville elementary schools. These staff include a head of schools, school principal, director of student services, and network literacy coordinator, all dedicated to our elementary programming. At the school level, we have hired an experienced elementary assistant principal of instruction and assistant principal of students. These six individuals have collaborated with the broader LEAD team to develop an elementary model that preserves the best part of the LEAD experience while customizing that experience for our youngest students. This team also serves as a strong launching point to successfully open our new elementary school.

LEAD Southeast Elementary School presents a compelling proposal with a solid plan and a proven applicant team. The commitment to academic excellence, social and emotional development, and community engagement positions the proposed school as a valuable addition to the educational landscape of southeast Nashville.

Section 1 – Academic Plan and Design

Section 1.1 - School Mission and Vision

In this section:

- a. 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.

At LEAD Southeast Elementary, our mission is the same as our network: to equip every student with the knowledge and skills necessary for success in both college and life. Our commitment to an all-encompassing educational model within the larger LEAD Network emphasizes the belief that every child can excel given the right opportunities and support. We firmly assert that all students, regardless of their zip code, deserve access to a high-quality education that prepares them for a robust future. LEAD's proven success in establishing and running schools attests to the impact a well-crafted mission statement can have on driving achievement and excellence in education.

While this overarching mission is the same at all of our schools, our purpose in ensuring students are prepared for both life and college has been cascaded down to the elementary level. As an elementary school, LEAD Southeast Elementary assumes a pivotal role in shaping the **fundamental** educational experience of LEAD students. Beyond the establishment of essential foundational skills, our school will be the nurturing ground where LEAD students foster their innate love for learning and exploration. It is here that they begin to form a sense of themselves as learners, embarking on a transformative journey towards fulfilling the overarching LEAD mission of being Ready for College and Ready for Life. The emphasis is on instilling a passion for learning and self-discovery during these crucial early years, setting the stage for lifelong academic success and personal growth.

LEAD Southeast Elementary will achieve its mission of ensuring all of its students have the skills necessary to be successful in college and life when LEAD Southeast Elementary meets or exceeds the performance standards outlined in this application. We will be achieving our mission when the following occurs:

- Students are exhibiting both achievement and growth on TNReady,
- Students are attending school regularly,
- Students are exhibiting positive behavior that aligns with our Ethos, resulting in low suspension and expulsion rates,
- Families continue to choose to enroll their student in our school year after year, and
- Teachers continue to choose to work at our school year after year.

See section 1.4 below for specific targets that define in detail each of the above metrics.

LEAD has made substantial significant investments for elementary leadership. Those individuals include:

- Dr. Ricki Gibbs, Elementary Head of Schools, 19 Years of Experience

- Stephanie Cummings, Elementary School Principal, 21 Years of Experience
- Justice Riddle, Dir Elementary Literacy, 15 Years of experience
- Ashley Wickiewicz, BCBA, Director of Elementary Student Services, 10 Years of experience
- Dr. Jamie Jenkins, Asst Principal of Students, Elem, 16 Years of Experience
- Dr. Carlos Comer, Asst Principal of Instruction, Elem, 26 Years of Experience

b. Describe the vision of the proposed school and how the vision will help achieve the school's mission.

LEAD Public Schools has been proud to serve the LEAD Southeast community since 2013, with almost 1,000 students thriving at LEAD Southeast Middle and High School. During this time, LEAD has developed strong relationships with students and families, while driving strong academic outcomes. Every day, LEAD is preparing LEAD Southeast Middle and High School students to be ready for college and ready for life. Our vision for this school is that it extends this strong connection between LEAD and the community from the middle and high school level back to the elementary grades. Our theory of action is that this elementary school will not only create a strong option for families at the elementary level, but continue to strengthen our student experience and the middle and high school levels, as well.

As with all of our schools, our vision for LEAD Southeast Elementary School will lay a solid foundation for all students, irrespective of their family's income or zip code, enabling them to confront challenges and embrace opportunities in post-secondary school life. To actualize this vision, LEAD Southeast Elementary School will employ several key elements in our model, strategically combined to fulfill the mission of preparing students with the knowledge and skills necessary for success in both college and life. These key elements are:

Research-Based, Rigorous Curriculum with an Emphasis on Early Literacy and Critical Thinking:

The school will offer a balanced curriculum that challenges and engages students, promoting foundational skills, the science of reading, and a conceptual understanding of mathematics in a safe and supportive environment. The curriculum used in our school will come from the state-approved curriculum list that encourages exploration, connections across subjects, and a connection to the broader world.



Individualized Learning Acceleration: LEAD Southeast Elementary will provide tailored support to students based on their specific learning needs through our dedicated time for Multi-Tier Support System implementation by extending beyond grade-level material to close academic gaps and accelerate their learning.

Social-Emotional Learning Based on the Five-Part Ethos: Students at LEAD Southeast Elementary will learn and apply the values of **Commitment, Courage, Discipline, Self-Reliance, and Service to Others**. These principles form the basis for a strong community, with routines and procedures fostering self-efficacy, independence, and social skills. Celebrations of learning reinforce students' pride in their achievements. The Ethos is a unifying force across all LEAD schools, shaping the behavior of everyone, from our CEO to our students.

Honoring Culture and Student Identity: Students will be embraced and the entire staff will actively support each child in recognizing their significance within the school community. Daily routines and procedures contribute to community building that respects and celebrates each student's identity.

All Means All: LEAD Southeast Elementary will be integrated into a holistic approach to closing disproportionalities in academic achievement between student groups who have historically underperformed within other educational settings.

Innovative Value Proposition and Staff Development Program Leading to Excellent Student Outcomes: LEAD Public Schools is dedicated to being the premier workplace in Nashville, ensuring sound compensation strategies and providing research-based, comprehensive support for the development of teachers and leaders. The educators and support staff at LEAD Southeast Elementary School will receive the same level of support that benefits all staff across the LEAD network, emphasizing a commitment to excellence and fostering positive student outcomes.

Intentional Career and College Focus: LEAD Southeast Elementary will instill in our students an early awareness of various college and career pathways, fostering a sense of their own futures. The school's programming will emphasize both academic foundations and soft skills crucial for sustained engagement in education and pursuit of their dream careers. This approach is rooted in research demonstrating that a two- or four-year degree significantly enhances success in both college and life, recognizing the evolving nature of career fields.

- c. Describe how the mission and vision of this school will meet the prescribed purposes for charter schools found in Tenn. Code Ann. § 49-13-102(a).

The mission and vision for LEAD Southeast Elementary will drive programming that meets the prescribed purposes for charter schools found in T.C.A. § 49-13-102(a). How LEAD Southeast Elementary will do this is outlined below:

1. **Improve learning for all students and close the achievement gap between high and low students:**
LEAD Southeast Elementary will be dedicated to improving learning for all students and narrowing the achievement gap between high and low achievers. This goal is pursued through continuous, rigorous grade-level learning experiences, fostering a sense of independence, and promoting community contribution. All these elements will be nurtured within a secure and supportive community

environment that respects individual identities and cultures, adopting an asset-based approach to ensure every student feels a sense of belonging at school.

Narrowing the achievement gap is a core focus of our All Means All vision, which provides a comprehensive lens for all staff to prioritize ensuring academic success for each student.

We will prioritize early literacy skills as a fundamental component of our mission to enhance learning for all students and bridge the achievement gap. Early literacy is a cornerstone in building a strong educational foundation, and we recognize its pivotal role in ensuring academic success and lifelong learning. We will emphasize employing evidence-based methodologies that accommodate the diverse requirements of our students.

Our early literacy strategy is firmly rooted in scientifically supported principles, establishing the foundation for critical reading and writing skills right from the outset of education. We employ a curriculum based on empirical evidence, crafted to foster fundamental reading and writing abilities in the initial phases of learning. By integrating interactive and captivating activities, students will build a strong foundation in phonics, vocabulary, comprehension, and fluency.

In tandem with grade-level learning experiences, LEAD Southeast Elementary will integrate intervention programs and employ data-driven strategies, which include routine assessments and progress monitoring. This proactive approach will allow us to pinpoint specific areas requiring improvement and customize instruction to meet the unique needs of each student. By doing so, we will ensure a focused and effective approach to early literacy education, promoting optimal learning outcomes for all students.

Our commitment to narrowing the achievement gap extends to systematic and purposeful staff development. Carefully designed initiatives align with a clear strategy, providing educators with intentional training and support to address the factors contributing to the achievement gap. The focus is on equipping staff with the tools, knowledge, and skills necessary to implement effective instructional practices, ultimately working towards reducing disparities in academic performance.

2. **Provide options for parents to meet educational needs of students:** LEAD Southeast Elementary will prioritize the individual needs of its students, offering a range of services tailored to diverse learning requirements. Specialized English Language Learner (ELL) programming underscores the commitment to addressing linguistic diversity. The school will remain responsive to the Southeast Nashville community, adapting programs based on the needs of the families we will serve.

Central to our approach is active parent engagement. Through regular communication channels such as surveys, workshops, and on/off-campus events, the school will ensure parents play a vital role in their children's education. The dedicated Family and Community Engagement Coordinator (F.A.C.E.) leads initiatives, and a Family Leadership Team enhances collaboration between school leaders and families.

Effective communication will be facilitated through tools like DeansList, addressing language barriers and making information accessible to diverse communities. The school will maintain a steadfast commitment to providing high-quality and rigorous education to all students, promoting exceptional and individualized learning experiences.

The implementation of Individual Growth Goals (IGGs) further reinforces academic mindsets and self-efficacy, fostering a culture that celebrates and recognizes each student's academic growth. Overall, LEAD Southeast Elementary will strive to create a supportive and inclusive learning environment, actively involving and engaging the local community in the educational journey of all of our students.

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:** At LEAD Southeast Elementary we will be unwavering in our commitment to uphold the core values of LEAD, which includes staying abreast of the latest research and educational methods. The school will be dedicated to merging these best practices with the specific needs of our community, ensuring a dynamic and relevant educational experience for all students.

The organizational structure of all LEAD schools, including LEAD Southeast Elementary, will be designed to offer flexibility. This flexibility will allow the school to be both proactive and responsive in prioritizing teacher support and programming. It will empower the school to set intentional and ambitious goals, fostering a culture where all staff members work collaboratively to not only meet but exceed academic goals each year.

A crucial aspect of this collaborative approach is the active involvement of school leadership teams and teachers in decision-making processes. Through ongoing surveys, roundtable discussions, and one-on-one interactions, the school will gather valuable insights and feedback. This collaborative feedback mechanism ensures that decision-making remains agile and responsive to the evolving needs of each school, promoting a culture of continuous improvement.

LEAD Southeast Elementary will stand committed to a dynamic and adaptive educational approach. By combining the latest research and educational methods with community-specific needs, maintaining flexibility in goal-setting, and actively involving stakeholders in decision-making, the school will strive to provide an exceptional and tailored educational experience for its students.

4. **Measure performance of pupils and faculty, and ensure that children have the opportunity to reach proficiency on state academic assessments:**

LEAD Southeast Elementary will be committed to adopting LEAD's comprehensive assessment program, which is a robust framework that employs multiple tools to assess student growth and proficiency. This

approach facilitates data-driven instruction, enabling educators to pinpoint areas where students require additional support on their journey to proficiency.

Regular meetings between school leaders and teachers are a cornerstone of this methodology. These gatherings aim to identify specific instructional gaps within classrooms and discern grade-level trends. Subsequently, the school employs targeted reteaching strategies, introduces appropriate scaffolds, and adjusts intervention programming based on a meticulous analysis of assessment data. This proven process will ensure that LEAD Southeast Elementary remains agile and responsive to the evolving needs of our students.

Furthermore, school leaders will engage in similar data analysis processes related to the Tennessee Educator Acceleration Model (TEAM) evaluations. This approach will allow them to tailor instructional support to address specific teaching needs and identify overarching trends within the teaching staff. Network staff will also play a vital role by reviewing data across schools, informing a network-wide strategy for professional learning and establishing focal points for school leaders.

These measures do not compromise grade-level instruction. Instead, they serve as supplementary tools to ensure students consistently receive college- and career-ready experiences. The ultimate goal is to empower students to demonstrate their proficiency on state academic assessments, thereby preparing them for future success. LEAD Southeast Elementary will be dedicated to maintaining high-quality instruction while adapting and refining our approach based on continuous data analysis.

5. Create new professional opportunities for teachers:

LEAD Southeast Elementary will be dedicated to fostering the best workplace environment in Nashville by recognizing teachers as the school's most valuable asset. LEAD's unique Value Proposition exemplifies this commitment through innovative strategies designed to support and reward educators. This includes a dedicated instructional manager (coach) for each teacher, a performance compensation plan, and a comprehensive leadership development program.

Teachers at LEAD Southeast Elementary will be able to actively participate in the leadership development program, which offers compelling incentives for those who choose to remain in the classroom. Teachers will be rewarded with annual base salary increases of up to 10% for displaying significant growth with their students. This approach aims to acknowledge and retain exceptional teaching talent at the school.

LEAD Southeast Elementary will put an emphasis on instructional growth of our teachers as a key driver of academic success for our students, nurtured through a robust coaching program that will consistently give teachers feedback and an opportunity to sharpen their skills. All staff members will partake in specially tailored professional development sessions held over the summer and throughout the school year to ensure that everyone is equipped with the knowledge and skills needed to excel in their roles.

LEAD Southeast will also encourage and support teachers who aspire to transition into other school- or network-based roles by ensuring school-based leadership is investing the professional growth of their teachers by giving them opportunities to lead key initiatives. This encouragement reflects a commitment to the professional growth and diverse career paths of educators within the LEAD network.

6. Afford parents substantial meaningful opportunities to participate in the education of their children:

LEAD believes deeply that providing an impactful education requires a strong partnership between families and the school. Thus, meaningful opportunities to participate in a child's education are a distinct feature of programming at all LEAD schools and will remain so in LEAD Southeast Elementary. Unique to LEAD's model is a full-time dedicated family and community engagement staff person, who coordinates all the family outreach at the school level. LEAD tracks meaningful engagement with families to ensure every single family is involved. Some of the opportunities for meaningful engagement include, but are not limited to, student-led conferences, our family leadership team, participation in on- and off-campus events, bi-weekly family surveys through Possip, and parent participation and volunteerism at campus-wide events like our international cultural festival and quarterly family workshops.

LEAD adapts to meet the current needs of our students and families, which are identified through our needs assessments led by our counseling department, and LEAD Southeast Elementary will operate in the same manner. An example of this is during remote learning, LEAD schools tracked family contact beyond meaningful engagement, aiming to connect with each family one to two times per week to ensure that they and their child had what they needed. This also ensured additional resources could be allocated to supporting families who needed the most help during a difficult time. Our LEAD Serve Others Stations provided "SOS Boxes" composed of household essentials, food, and other daily necessities to meet the needs of families.

LEAD Southeast Elementary will continue to invest in programs to ensure regular communication with families whose primary language is not English. LEAD currently uses DeansList to communicate with our families, which offers language translations in their individual home language.

- d. Describe how the mission and vision of the proposed school address any priorities set by the authorizer.

The MNPS Charter Authorizer Handbook (2022) states the following as their priority for charter schools:

"MNPS seeks charter school applications to cultivate strong school capacity in order to provide high quality academic instruction for all students. The purpose of MNPS charter schools is to advance the district's vision for excellence and diversity while meeting the needs of a growing city for new school capacity."

Listed below are ways that LEAD Southeast Elementary School meets the priorities of the MNPS Office of Charter Schools simultaneously supporting the efforts of the MNPS strategic plan.

- **Meet the needs of a growing city for new school capacity:** LEAD Southeast Elementary will provide needed capacity in the elementary grades for an area of the city that is experiencing population growth, as well as providing more K-5 seats as other elementary facilities attempt to accommodate the addition of 5th grade.
- **Cultivate strong school capacity in order to provide high-quality academic instruction for all students:** LEAD Public Schools has a demonstrated history of running successful charter schools focused on the belief that any student can achieve at high academic levels if given the opportunity to do so. Using the lessons learned in our existing schools, and with strong emphasis on foundational literacy and numeracy skills, LEAD Southeast Elementary School will provide an excellent elementary school option to students and families in southeast Nashville.

Additionally, the Every Student Known initiative within MNPS Reimagined¹ outlines focused outcomes for students across all grades in four core areas: literacy, numeracy, social emotional learning (SEL), and attendance. In 5th grade², a focused outcome surrounding transition preparation has been added (MNPS website, n.d.). Below, we outline how the creation of LEAD Southeast Elementary aligns to the K-4 and 5 outcomes of the MNPS Reimagined Plan:

1. Students meet or exceed their individual academic growth projection in literacy and in numeracy:

LEAD Southeast Elementary School will develop a comprehensive plan for instruction in English Language Arts (ELA) and mathematics, coupled with robust support mechanisms for students facing challenges in these subjects. The school's assessment strategy will be designed to provide multiple opportunities for students to showcase their progress toward achieving grade-level proficiency.

A distinctive feature of LEAD Southeast Elementary's approach will be the implementation of Individual Growth Goals (IGGs). These goals will be set at 1.5 years of growth over the course of a year until students reach grade level. This internal metric, also utilized in LEAD network middle schools, will serve as a valuable tool for teachers and administrators. It will allow them to monitor and ensure that all students who are behind are progressing at an accelerated rate, while simultaneously ensuring that students who are at or above grade level continue to experience growth.

This strategy reflects a commitment to personalized and targeted support for students at all proficiency levels. By employing IGGs and leveraging assessments that provide multiple opportunities for students to demonstrate their progress, LEAD Southeast Elementary will foster a learning environment that promotes continuous improvement and growth for every student. This approach aligns with the broader goals of the LEAD network and emphasizes the importance of tailoring support to individual student needs.

¹[Every Student Known](#), Metro Nashville Public Schools

² [Every Student Known](#), Metro Nashville Public Schools

2. **Students achieve satisfactory attendance with an attendance rate of 95% or above:** At LEAD, we know that the first step to our students' learning is ensuring that they are in school. LEAD Southeast Elementary School will use a variety of proven strategies to ensure that students attend school regularly. These include:

- A dedicated staff member whose primary responsibility is addressing chronic absenteeism and managing the attendance team
- A dedicated family engagement staff person to identify and fill needs that may prevent families from supporting student attendance
- The LEAD Serve Others Stations that create a partnership with families to ensure student success and build community by providing household essentials and basic necessities to help families get their students to school daily
- Investments in DeansList, a learning platform that improves family communication and tracks the chronic absenteeism response process down to phone calls
- Work with families directly to impress the importance of school attendance as a determinant factor of student success
- Investing and engaging all staff in the importance of student attendance and the measures each person can take to help it improve

3. **Students display intrapersonal skills through demonstrating self management and self-awareness. Students display an understanding of community by demonstrating personal and social responsibility:** At LEAD Southeast Elementary, our school culture will be firmly grounded in the foundational principles of our Ethos, where we prioritize social and emotional learning (SEL) and trauma-informed practices. By seamlessly integrating these strategies into classroom activities, educators effectively foster the development of intrapersonal skills, nurture community, and create a supportive environment that caters to diverse student needs. LEAD recognizes the bidirectional relationship between mental health and academic achievement, aligning trauma-informed care with SEL, disciplinary response, classroom management, and academics to maintain a focused commitment to education.

To further enhance our dedication to SEL, we will place a significant emphasis on Crew. During these meetings, students will purposefully engage in the deliberate cultivation of social and emotional skills. This intentional effort is complemented by the integration of relationship and community-building activities, fostering strong interpersonal connections. Crew serves as a platform for joyful exploration and independence, encouraging curiosity and empowering students to discover and develop their interests. This not only contributes to individual growth but also adds vibrancy to the overall learning experience. In fostering a positive daily culture, we instill a sense of pride in both the school as a collective entity and in each individual student, motivating active participation and ownership of academic and personal development.

Adding to our commitment to well-being, BeWell in School is a science-backed mindfulness program empowering elementary students to regulate their emotional needs and create a positive and

nurturing educational experience. Staff and students at LEAD Southeast Elementary will engage in movement, mindfulness, and breathing techniques to foster a sense of balance and well-being. Students will take ownership of their actions, demonstrating a keen understanding of their emotions and behaviors. Moreover, they will display a profound understanding of community through the demonstration of personal and social responsibility, recognizing how their behavior impacts both themselves and those around them. This understanding fosters a sense of belonging, cooperation, and contribution within the school community.

To further promote self-awareness, students will participate in conferences to set Individual Growth Goals (IGGs), acknowledging strengths, areas of growth, and reflecting on aspects of self-discipline and determination. Demonstrating personal and social responsibility showcases an understanding of how actions impact individuals and the community.

4. **Every 4th/5th-grade student develops a transition plan that includes academic and SEL goals and needs to prepare for successful transition to middle school:** At LEAD Southeast Elementary, students will be actively engaged in their educational journey through a structured approach, including the implementation of Individual Growth Goals (IGGs). These goals will be set at 1.5 years of growth over the course of a year until students reach grade level, reflecting a commitment to personalized and targeted student support.

As students approach the transition to middle school, LEAD Southeast Elementary will integrate certain middle school structures into the elementary programming to facilitate a seamless progression. For instance, in the 5th grade, students will take on the responsibility of facilitating student-led conferences (SLCs). This initiative is designed to instill a sense of ownership in their educational journey, preparing them for the transition to middle school.

We anticipate that many students from LEAD Southeast Elementary will choose to attend LEAD Southeast Middle, which will ensure a smooth continuity within the LEAD Public Schools network. The advantage of being part of the network's data systems allows receiving teachers to closely monitor students' progress on both internal and state-mandated assessments. This comprehensive tracking system also enables teachers to stay informed about persistent areas of need for transitioning students and their families.

This holistic approach not only emphasizes academic growth but also fosters a sense of responsibility and ownership in students, ensuring a well-supported transition from elementary to middle school. The integration of student-led conferences and a robust data tracking system underscores LEAD's commitment to providing a cohesive and supportive educational experience for all students.

- e. Describe what the proposed school will look like when it is achieving its mission.



Our students' day at LEAD Southeast Elementary will not just be an educational journey; it will be a holistic experience that nurtures their curiosity, independence, and sense of community. Our focus on engaging activities, supportive teachers, and a positive environment contributes to our students' overall growth and enthusiasm for learning. What our school looks like when achieving its mission can be viewed through the lens of a day in the life of a LEAD Southeast Elementary student. A student's day at LEAD Southeast Elementary will be a vibrant and engaging experience, filled with various learning activities and opportunities for personal growth. An example of a typical day at LEAD Southeast Elementary will be comprised of the following:

Morning Routine:

- Arrival and Breakfast: Students arrive at school and walk to their classroom where they will eat breakfast in the classroom.
- College Aspirations: As students walk to class, they will see college pendants on the wall, sparking excitement and inspiration to envision future possibilities.
- Independence and Environment: Students will demonstrate independence by correctly disposing of their items in the recycling bin or trash as appropriate.
- Ethos: Students will place a popsicle stick with their name on it in a jar with the Ethos of the school affirming which Ethos they will exemplify during the day (Commitment, Discipline, Serve Others, Courageous, Self-Reliant).

Crew Time:

- Morning Message: Teachers will display a morning message, setting the tone for the day's activities.
- Morning Meeting: Students will actively participate in the morning meeting, engaging in activities that focus on early literacy skills and mathematical concepts that have been previously taught.
- Ethos: Teachers will select a student's name out of each Ethos jar and verbally ask them to share aloud how they will exemplify the Ethos they choose for the day.

Math and Number Corner:

- Hands-On Learning: Our students will enjoy a hands-on math activity, while exploring mathematical concepts and being challenged to have educational discourse with their classmates and teacher in an effort to fully understand numbers.
- Thinking Walk: The class will participate in a thinking walk, sharing and appreciating their classmates' thought process used to solve a problem.

Reading Skills Block:

- Foundational Skills: Our students will engage in a review of syllables, practicing identification and creation of words using Tennessee Foundational Skills.
- Comprehension Block: During this block, our students will actively participate in activities that focus on enhancing both reading fluency and comprehension. Additionally, the block will include dedicated time for writing exercises to further develop their writing skills.

Recess and Lunch:

- Recess: Our students will enjoy a daily 20-minute monitored recess as well as a 30-minute lunch.
- Cafeteria Experience: Our students will have the opportunity to sit with friends while they eat, and this time will also be open to families to join their students to eat.

Art Class:

- Art Exploration: In the art class, our students will have the opportunity to explore various forms of art, fostering an immersive and enriched experience that nurtures a genuine love for artistic expression. They will also be able to showcase their artwork around the school, fostering a sense of pride.

Multi-Tiered System of Support (MTSS):

- Close Reading: Our students will participate in a close reading of books, building vocabulary and comprehension.
- Small Group Support: Teachers will provide additional support in a small group setting, reinforcing academic vocabulary and utilizing graphic organizers.
- Computer-Based Centers: Students will also have access to an educational learning platform designed to improve their abilities in literacy and numeracy.

Closing Circle:

- Celebrations: Students will share daily celebrations, contributing to a positive and supportive class culture.

End of the Day:

- Dismissal: Teachers will dismiss the class, high-fiving each student, as they reflect on our Ethos as well as on the college pendants, considering their future.

Beyond a “day in the life,” when considering what the school looks like when it is achieving its mission, we also examine what that looks like for students, families, teachers, and visitors:

Students

Visual Culture: Students will be excited by a print-rich, visual culture promoting a variety of colleges, careers, and other post-secondary options.

Self-Efficacy and Independence: Students will feel a sense of self-efficacy and independence, facilitated by clear engagement in routines and procedures with the help of visual aids.

Belonging and Community: Students will feel a sense of belonging as they build social skills and community during morning circles and other shared routines. This will build relationships and foster an inclusive and supportive environment for all students.

Curiosity and Exploration: Students will feel curiosity as they explore new concepts, connecting them to previously learned concepts and the world around them. They will have frequent opportunities to explore life beyond the walls of the school through hands-on activities, field trips, guest speakers, enrichments, and meaningful use of technology.

Enthusiasm and Pride: Students will express enthusiasm and pride in their schoolwork following daily celebrations of learning and regular opportunities to showcase learning to their school community. Our culture will make it “cool to be smart” where we will foster pride in doing your best and having enthusiasm for taking on challenges.

Desire to Attend School: Students will have a genuine desire to be at school, regularly experiencing joy and willingness even when facing challenging content. We will be intentional with our student and family engagement and wrap-around services for students so they can feel supported and successful at school.

Close Relationships: Students will form close relationships with peers and at least two adults, fostering a supportive school environment. We will use morning meetings, family calls/conferences, school-wide traditions, and other shared moments to create strong relationships among students, and between students, staff, and families.

Love of Reading: Students will develop a love of reading and exhibit enthusiasm for reading grade-level texts through a comprehensive school literacy plan that will outline our goals and actions steps for academic reading and reading for pleasure. The ability and desire to read both academic and recreational reading are strong indicators of future success and leadership.

Family

Sense of Community: Families will experience a strong sense of the broader K-12 community through our intentional outreach and collaboration with families. We want to equip families with the tools to be true partners in advancing their children’s educational goals.

Welcoming Environment: Families will feel welcome and build relationships with school-based staff and other families as a result of our warm and competent team. Our school building will be clean and decorated with current materials, and school images and artifacts will be inclusive and reflective of our school community.

Observation Opportunities: Families will have the ability to observe and attend classes to serve as true education partners and gain perspective about what their students are learning in school.

Excitement for Events: Families will be excited to attend and support school events such as art shows, international festivals, student-led conferences, and award ceremonies. This will provide an opportunity for our students to showcase their learning and engage our families and community members in authentic ways.

Pride and Happiness: Families will feel pride and happiness knowing that their child enjoys school, feels challenged, and is growing in their academic competence and social leadership. Our intentional outreach, social media, and other outlets inform families so they can be ambassadors for our school.

Teachers and Staff

Retention: Teachers and staff will remain year after year as a result of thoughtful staff engagement and purposeful development for each staff member.

Positive Survey Results: Teachers will rank in the top quartile for the instructional index on surveys like The New Teacher Project's (TNTP) Insight Survey. Positive feedback will be received regarding professional development, retention, and school culture.

Support and Development: Teachers and staff will be supported and developed, with a clear vision for their professional growth aligned to our network goals and professional competences.

Visitors

Visitors to LEAD Southeast Elementary School will witness:

Visible Thinking: All students exhibiting visible thinking in all classes, actively engaging in lessons derived from scientifically researched and evidence-based curriculum materials.

Inclusive Learning Opportunities: All students, regardless of background, have access to a range of learning opportunities both within and beyond the classroom with the targeted support they need to have success.

Reflective Visual Culture: A visual culture reflecting the mission, emphasizing college- and career-readiness, and honoring community values, cultures, and priorities.

Celebrations of Growth: Visible celebrations of student growth and achievement, celebrations of social growth, and team celebrations to keep staff morale high.

Student Articulation: Students will be able to articulate that they enjoy school and specify what aspects they find enjoyable. We use shared language grounded in our school's values and goals so that students have language to express themselves academically and socially.

Ethos Adherence: Students modeling the school's Ethos in action, articulating what each Ethos represents with examples that are appropriate for young learners and leaders.

Strong Communication: Families reporting – through surveys, conferences, and other pulse checks – a strong line of communication between home and school. Communications are centered around a true academic partnership between families and the school.

Reading Enthusiasm: Students expressing enjoyment in reading, consistently having independent reading books, and feeling challenged and supported to read grade-level texts and beyond. Our philosophy is that readers are leaders and we will develop a community of readers aligned to that vision.

These outlined outcomes collectively contribute to the realization of LEAD Southeast Elementary School's mission, fostering a vibrant, supportive, and academically enriching environment for all stakeholders.

- g. How do these unique features align with the mission and vision of the school?
- h. How will these unique features foster student achievement and success?

The unique features integrated into LEAD Southeast Elementary align seamlessly with the school's mission and vision, reflecting a commitment to innovation and excellence in education. Innovative features of the LEAD Southeast model include:

LEAD Value Proposition and Staff Development

LEAD schools pride themselves on having a value proposition and teacher development plan that is unlike other schools. What is typically considered an “instructional coach” within other school systems has been redesigned in the LEAD model as an “instructional manager.” This unique role is responsible for not just providing the classroom coaching for a teacher, but is responsible, as a teacher’s manager, for guiding their full employment experience. We keep our instructional manager span of control manageable, crafting their role to



support 6-8 teachers. This focus allows each teacher to have an individualized coaching plan. High-performing teachers are eligible to participate in our Master Teacher program, a distinguished category of LEAD teachers, unlocking additional development opportunities and compensation. Our commitment to excellence extends beyond the standard academic calendar, with extra days dedicated to professional development which ensure our teachers have opportunities for professional growth that surpass state requirements.

All leaders in the LEAD network are eligible for our leadership development program, which includes an executive coach, 360 program, and leadership assessments. We build leaders through individual leadership development plans and specific succession planning. Finally, all staff are eligible for our unique compensation plan, which rewards high performance with up to 10% per year salary increases.

Individualized teacher coaching and leadership development pathways directly support the mission of cultivating a high-caliber teaching community. By offering individualized coaching and various pathways for leadership development, the school will ensure that educators are equipped with the tools and strategies needed to excel in their roles. A highly skilled and motivated teaching staff directly correlates with improved student outcomes. Teachers who receive personalized support and opportunities for growth can implement innovative teaching methods, leading to increased student engagement and achievement. In addition, our unique focus on both development and compensation ensures that teachers and leaders are more likely to stay and build long careers within their school. This approach yields stability within our staff that supports both student achievement and a strong culture. Further information about our approach to development can be found in Sections 2.4. and 2.5.

Connection to the Vibrant LEAD Southeast Community

Unlike other stand-alone elementary schools, LEAD Southeast Elementary has been designed to fit within a K-12 continuum of services. LEAD Southeast Elementary students will join a strong culture of schools built at LEAD Southeast Middle and High School. Partnering with LEAD Southeast Middle and High School to develop traditions and celebrations unique to the LEAD Network schools in southeast Nashville builds a sense of identity and pride. A school community with shared traditions and celebrations fosters a positive and cohesive environment. Students who feel a strong connection to their school are more likely to be engaged, motivated, and successful in their academic pursuits.

In addition, we plan to work with our elementary families to create community-defined unique elements. Inviting families and community partners to define additional unique elements for the school promotes a sense of ownership and community involvement. When students see that their school values and incorporates input from their community, it enhances their sense of belonging and connection. This positive school culture contributes to a supportive atmosphere that nurtures student well-being and, in turn, academic success.

Dedicated Family Engagement and Family Support

Family engagement is also a cornerstone of our innovative approach, with a dedicated, full-time Family and Community Engagement Coordinator (FACE) that will support LEAD Southeast Elementary. Our FACE is critical to the success of both the launch of the school and the ongoing relationship with our school. This is evidenced by our plan to make our FACE one of the first hires upon the awarding of our charter. This role is critical in supporting families through our innovative LEAD Serve Others Stations and Family Exchange, two ways in which our school provides wraparound services to the broader Southeast Nashville community.

Our goal is to successfully engage 100% of our families in the school community, acknowledging and adapting to their unique family situations. LEAD Southeast Elementary will go beyond the conventional by inviting families and community partners within the Southeast Nashville community to define additional unique elements that contribute to the richness of our educational environment. Family engagement key performance indicators (KPIs) and the goal of successfully engaging 100% of families reflect a commitment to building strong partnerships between the school and its community. This aligns with the mission of creating a vibrant and connected school community. It also corresponds with the vision of establishing a supportive network where families play an active role in their child's education.

Inviting families and community partners to define additional unique elements underscores the school's commitment to inclusivity and community-driven education. This aligns with the mission of creating an educational environment that values diverse perspectives and actively involves the community. It also corresponds with the vision of building a school culture that celebrates individuality and embraces collaborative input from all stakeholders. Developing traditions and celebrations unique to the LEAD Network schools in southeast Nashville reinforces the mission of creating a cohesive and identity-rich educational community. This aligns with the vision of fostering a sense of belonging and pride among students, educators, and the broader community.

Research consistently shows that strong family engagement positively impacts student achievement. By

fostering positive partnerships between the school and families, students receive support both at home and in the school community, creating a conducive environment for academic success. Further information about our family engagement can be found in Section 1.10.

Personalized Learning and Intervention

Setting and tracking individual student growth goals within a data-driven instruction system will ensure a personalized learning experience for each student. This approach aligns with the vision of fostering a dynamic and inclusive educational environment where every student can thrive academically. The focus on reading and mathematics intervention programs showcases a commitment to addressing diverse student needs and ensuring academic success. This aligns with the mission of providing a supportive and inclusive learning environment that caters to individual student requirements. It also corresponds with the vision of fostering a culture of achievement where every student can excel.

The emphasis on setting and tracking individual student growth goals within a data-driven instruction system ensures that each student's learning journey is tailored to their specific needs. This personalized approach addresses diverse learning styles and paces, fostering a supportive environment where students can thrive academically. By aligning instruction with individual goals, students are more likely to experience success and a sense of accomplishment.

The focus on intervention programs for reading and mathematics addresses academic challenges proactively. Targeted support for students who may need additional assistance ensures that learning gaps are identified and addressed promptly. This individualized attention contributes to a more inclusive and equitable learning environment, where every student has the opportunity to achieve academic success. Addressing the diverse needs of our students, our school places a special focus on reading and mathematics intervention programs, providing targeted support to ensure every child reaches their full potential.

All Means All

LEAD Southeast Elementary will be rooted in the established LEAD practices of All Means All (AMA), which reinforce a laser-like focus on narrowing gaps in student achievement and reducing differentials among student subgroups and the “all students” category on network- and state-wide assessments. All Means All is a 15-month, cohort-based fellowship for school leaders and their school- or network-based teams. The program pairs key levers to address inequity in schools with deep coaching, feedback, and collaboration to sustain it. Through this work, we have been able to shine light on systemic barriers to achievement for our diverse learners and to begin the work to address the root causes of lack of strong student outcomes. Essential to this work is our focus on narrowing the differentials in achievement on both our network-wide and state assessments. After each interim assessment, these differentials are analyzed and strategies for addressing areas of need are formulated.

AMA has also informed our network practices around hiring, staff development, and staff ownership of school challenges. LEAD Southeast Elementary staff will be trained on the values, actions, and

behaviors we believe to be essential for staff success in improving student outcomes. We are unashamedly transparent about these beliefs within the hiring process and have found that this transparency has led to hiring staff who are aligned with our belief in the inherent worth of all students and their capacity to grow and learn. Staff will be grounded in LEAD Southeast Elementary's values, actions, and behaviors upon their entry, and intentional reorientation occurs frequently throughout the year. Staff will engage in data-driven decision making, and AMA's radical problem-solving process will allow team members from diverse roles and backgrounds to work together to tackle problems from a variety of perspectives. This process creates buy-in for solutions to challenging situations and distributes ownership for the work to accomplish those solutions among school teams.

This approach yields significant results in improving achievement for all students, while reducing differentials. As a result, LEAD Public Schools was identified as a "gap buster" in both reading and math for closing achievement gaps by Stanford Credo's National Charter School Study 2023³, in addition to evidencing strong positive growth results in both reading and math.

These unique features will collectively contribute to a student-centered, inclusive, and supportive educational environment at LEAD Southeast Elementary. By addressing individual needs, fostering strong teacher-student relationships, and actively involving families and the community, the school will set the stage for enhanced student achievement and long-term success.

³[As a Matter of Fact: The National Charter School Study III 2023](#), Stanford University

Section 1.2 - Enrollment Summary

In this section:

- a. Describe the community, including specific zip codes, 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.

In short, the specific population of students we intend to serve are the younger siblings and relatives of our existing LEAD Southeast Middle and High School families. In our current enrollment management, we have consistently seen a need for elementary grades for relatives of currently enrolled LEAD Southeast students evidenced by our ability to consistently enroll 35-55% of our incoming 5th grade class with younger siblings of our rising 6th, 7th, and 8th grade students. The primary targeted student population is a diverse group of students in southeast Nashville. Enrollment efforts will focus on students in the Cane Ridge, Antioch, and Glencliff clusters located in the southeast region of Davidson County. This broader approach to enrollment limits the draw of students from a single cluster/feeder pattern.

Students in these clusters are diverse, predominantly low income, and in need of rigorous elementary school options in that part of the county. As with all our schools, we welcome all students regardless of income level, disability status, language ability, etc.

The ideal location for the school will be in the Glencliff cluster, in close proximity to LEAD Southeast Middle and High where we currently serve over 800 students in grades 5-12. Southeast Nashville is home to families representing a rich diversity of cultures and multiple community organizations committed to enhancing education for its students. As we believe that we will enroll families whose students currently attend LEAD Southeast Middle and High School, familiarity with the community and established transportation routes will allow network staff to seamlessly establish routes for elementary students and provide a level of comfort and familiarity to families within the community.

We anticipate the demographics will be similar to that of LEAD Southeast Middle and High, with approximately half of students identified as Hispanic, 23% identified as White, and 16% as Black. Approximately 50% of students will be English Learners, and 10% will be students with disabilities. We expect at least 30% of students will be identified as economically disadvantaged. We anticipate the primary languages being spoken to be English, Spanish, and Arabic.

The secondary targeted student population is other Nashville students who, under state law, are eligible for the appropriate grade and are residents of Davidson County. If demand exceeds available seats, selection will be via random lottery as prescribed by state law.

- b. Provide a rationale for determining enrollment projections and selecting the community where the proposed school will be located.

Each year, our middle schools receive students from across the city averaging one to three years behind grade level according to MAP assessments administered within the first month of school. LEAD Southeast Elementary will meet the needs of the larger southeast Nashville community in which elementary schools have met or are nearing capacity. This is a thriving community that is expanding, creating the need for additional quality elementary school options.

The population growth in southeast Nashville is evident and the concentration of families with young children support the need for quality school options in the area. Families in southeast Nashville encounter two primary issues when considering public school attendance: school capacity to meet the growing needs of the area; and the need for more high-quality schools options. MNPS capital plans support the need for expansion of school seats to accommodate rapid population growth in southeast Nashville. LEAD Southeast Elementary School directly supports the MNPS Charter Office's defined purpose of charter schools to advance the district's vision for excellence and diversity while meeting the needs of a growing city for new school capacity.

LEAD Southeast Elementary students will have the opportunity and the security of knowing that they have a seat at LEAD through graduation, with students being able to pathway on to LEAD Southeast Middle and High. We know through our enrollment efforts that families are looking for high-quality options that they can secure their enrollment in a K-12 option. As evidence of our families commitment to choosing a LEAD education, more than 90% of our graduating 8th grade students matriculate into our high school annually. Providing this security is vitally important for families looking for a high-quality option.

As a part of our enrollment management process, LEAD Public Schools will continue its current practice of back-filling its enrollment throughout the school year in order to track to our stated ADM targets. This will result in consistent enrollment, and class sizes, by grade level, despite any anticipated attrition. Monthly monitoring of our inward and outward mobility against family interest through the optional schools' process are key metrics for informing our decisions to additionally enroll throughout the school year. This is our plan, and we will continue to complement our initial application sourcing with year-round recruitment efforts to ensure that we have demand throughout the year to source families to backfill our enrollment as attrition occurs.

Community canvassing, targeted social media recruitment campaigns, mailers, partnerships with key apartment complexes, and community meetings will continue to be tactics utilized to source applications year-round; all of which are best practices utilized at both of our opt-in charters who currently track or exceeds ADM targets and maintain a waitlist all year long.

LEAD Public Schools operates both neighborhood zoned enrollment, as well as fresh start, open enrollment charters. LEAD has consistently met or exceeded all its enrollment targets for its open enrollment charters, showing that we have a proven track record of enrollment results for similar charter schools as the elementary school proposed.

See section 1.9 below for further information about demand for our school that supports our enrollment projections.

- c. Discuss the academic performance and enrollment trends of existing schools in that community.

Elementary schools in the Antioch, Glenclyff and Cane Ridge clusters are underperforming other district and state schools in terms of proficiency results on the 22-23 TNReady Assessment. See the table below for details. Last year, not a single elementary school in these clusters scored above the Grades 3-5 district average in ELA and only one of 21 schools scored above district average in Math. In comparing results to the state Grades 3-5 results, elementary school performance looks even worse, with the vast majority of elementary schools almost 20 percentage points behind the state average.

school_name	Cluster	School Type	Grade	ELA			Math		
				Success Rate	District Variance	State Variance	Success Rate	District Variance	State Variance
Thomas A. Edison Elementary	Antioch		C	24	(7)	(16)	21	(9)	(21)
J. E. Moss Elementary	Antioch		C	16	(15)	(24)	22	(9)	(20)
Lakeview Elementary	Antioch		C	24	(7)	(16)	29	(2)	(13)
Mt. View Elementary	Antioch		C	19	(12)	(21)	22	(9)	(20)
Una Elementary	Antioch		D	18	(13)	(22)	22	(9)	(20)
Smith Springs Elementary Schoc	Antioch		C	25	(6)	(15)	26	(4)	(16)
Antioch Average				21	(10)	(19)	24	(7)	(18)
Intrepid College Preparatory Ch	Cane Ridge	Charter	C	16	(15)	(24)	12	(19)	(31)
KA @ The Crossings	Cane Ridge	Charter	D	20	(10)	(20)	7	(24)	(35)
A. Z. Kelley Elementary	Cane Ridge		C	23	(8)	(17)	28	(2)	(14)
Cane Ridge Elementary	Cane Ridge		C	26	(4)	(14)	26	(5)	(17)
Eagle View Elementary School	Cane Ridge		C	23	(7)	(17)	18	(13)	(24)
Cole Elementary	Cane Ridge		D	17	(14)	(23)	19	(12)	(23)
Henry C. Maxwell Elementary	Cane Ridge		C	24	(7)	(17)	21	(9)	(21)
Cane Ridge Average				21	(9)	(19)	19	(12)	(23)
STEM Prep Academy	Glenclyff	Charter	B	29	(2)	(11)	23	(8)	(19)
Rocketship Nashville Northeast	Glenclyff	Charter	D	19	(11)	(21)	13	(18)	(29)
John B. Whitsitt Elementary	Glenclyff		B	29	(2)	(12)	45	15	3
Fall-Hamilton Elementary	Glenclyff		C	29	(1)	(11)	24	(7)	(18)
Glenclyff Elementary	Glenclyff		C	16	(14)	(24)	29	(1)	(13)
Glengarry Elementary	Glenclyff		C	24	(7)	(16)	19	(12)	(23)
Glenview Elementary	Glenclyff		D	18	(12)	(22)	17	(14)	(25)
Paragon Mills Elementary	Glenclyff		C	16	(15)	(25)	19	(12)	(23)
Glenclyff Average				23	(8)	(17)	24	(7)	(18)
Metro Nashville Public Schools				31		(9)	30		(12)
State of TN				40			42		

In terms of enrollment, K-5 district enrollment in these three clusters (Glenclyff, Antioch, and Cane Ridge) have been stable or growing, emerging out of the pandemic. Antioch, in particular, is experiencing significant increases in K-5 enrollment with a more than 7% increase in K-5 enrollment since the 2019-20 school year. Of particular note is the shift of 5th grade enrollment from local middle schools to local elementary schools. This shift of enrollment is putting particular pressure on elementary capacity throughout this area. Unlike the majority of clusters in Davidson County, Glenclyff and Antioch have no facilities listed on the most recently publicly released [vacant and underutilized property list](https://www.tn.gov/content/dam/tn/education/nonpublic/chtr_sch/MNPS%20Underutilized%20and%20Vacant%20Facilities%20Report.pdf)⁴, indicating that both these clusters both have enough enrollment demand to fully fill the existing school facilities located in the region.

⁴https://www.tn.gov/content/dam/tn/education/nonpublic/chtr_sch/MNPS%20Underutilized%20and%20Vacant%20Facilities%20Report.pdf most recent publicly reported facilities report, required per state law to be released annually

K-5 Enrollment of District-Run Schools by Cluster					
Cluster	2020	2021	October 2022	October 2023	<i>Enrollment Change Since 2020</i>
Glenclyff	2717	2654	2726	2728	0.4%
Antioch	5120	5068	5371	5485	7.1%

- d. Describe the specific population of students the proposed school intends to serve.

See the response to (a) above.

- e. Describe what the proposed school would do more effectively than the schools that are now serving the targeted population.

LEAD Public Schools has demonstrated a commendable track record in achieving high academic outcomes, particularly evident in LEAD Southeast Middle School, the network's college-preparatory middle school located in Antioch. Recognized as a Reward School for Growth in 2015, LEAD Southeast Middle has consistently outperformed neighboring middle and high schools on metrics of school performance, including A-F ratings, Success Rate, and student growth. The proposed LEAD Southeast Elementary School aims to extend this legacy by providing a quality school option to families in the area. With LEAD's proven history of surpassing neighboring schools in both growth and achievement, LEAD Southeast Elementary will be committed to serving the local population and addressing the educational needs of the community.

In addition, through our focus on All Means All, LEAD schools are incredibly focused on reducing achievement gaps. As mentioned earlier, LEAD Public Schools was identified as a "gap buster" in both reading and math for closing achievement gaps by Stanford Credo's National Charter School Study 2023⁵, in addition to evidencing strong positive growth results in both reading and math.

Finally, the creation of LEAD Southeast Elementary will provide a unique pathway for families to have continuity in their education experience from K-12.

- f. What different educational options will the proposed school offer?

The proposed LEAD Southeast Elementary School will be designed to offer a diverse range of educational options to cater to the unique needs and interests of its students. These options will encompass various aspects of academic, social, and emotional development, contributing to a well-rounded educational experience. Some key educational options include:

- **Access to the LEAD Experience in the Elementary Grades:** Existing LEAD families are strongly dedicated to the LEAD community; for the first time, these families and our broader community will have access

⁵[As a Matter of Fact: The National Charter School Study III 2023](#), Stanford University

to the LEAD experience for their younger siblings and family members.

- **Rigorous Academic Programs:** The school will provide a rigorous academic curriculum that aligns with state standards and goes beyond, challenging students to excel in core subjects such as mathematics, language arts, science, and social studies. Differentiated instruction and personalized learning approaches will be incorporated to meet individual student needs.
- **Ethos-Based Education:** LEAD Southeast Elementary will continue the tradition of Ethos-based education, emphasizing the development of social and emotional skills. This approach aims to prepare students not only academically but also for success in college and life by fostering qualities such as resilience, empathy, and effective communication.
- **Exposure to College Culture:** The school will offer developmentally appropriate exposure to college culture, instilling in students the importance of higher education from an early age. This will include activities such as college visits, discussions about career paths, and interactions with professionals to broaden students' perspectives on future possibilities. Elementary students will meet LEAD Southeast High School seniors who will share with them their post-secondary plans upon graduation.
- **Career Days/Fairs:** Organizing career days and fairs will provide students with insights into various professions and industries. This hands-on exposure helps them make informed decisions about their future careers and sparks interest in different fields.
- **Targeted Interventions and Supports:** Recognizing the diverse learning needs of students, the school will implement targeted interventions and support systems. These will include additional resources, tutoring programs, and personalized assistance to ensure that every student has the opportunity to thrive academically.
- **Efficient Formative Assessments:** The use of formative assessments will be an integral part of the educational approach. These assessments will be employed efficiently to gauge student progress, identify areas for improvement, and tailor instruction to address specific learning needs.
- **Positive and High Expectations School Culture:** The school will foster a positive and high expectations culture, creating an environment where students are motivated to excel. Clear expectations for behavior, academic achievement, and personal growth will contribute to a culture of excellence.
- **Co-curricular Activities:** To provide a holistic educational experience, LEAD Southeast Elementary will offer a range of co-curricular activities. These will include clubs, arts programs, and other extracurricular opportunities to encourage students' physical, creative, and social development.

By offering this array of educational options, LEAD Southeast Elementary aims to create a dynamic and inclusive learning environment that meets the diverse needs and aspirations of its students, preparing them for future success in both academic and personal pursuits.

g. Complete the provided templates [Table 1: Enrollment Summary](#) and [Table 2: Anticipated Demographics](#).

h. Describe any enrollment practices, processes, and policies of the proposed school that will differ from your existing school(s); and

Not applicable; LEAD Southeast Elementary School will follow the enrollment practices of other LEAD Charter Schools.

- i. How the community for the proposed school is similar and/or different from the community that you currently serve.

The community from the proposed school is identical to that served by LEAD Southeast Middle School and High School with the only exception of the age of the students.

Table 1: Enrollment Summary

Student Growth Over Years of Operation

Year of Operation	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Full Capacity
School Year											
K	60	60	60	60	60	60	60	60	60	60	60
1	35	60	60	60	60	60	60	60	60	60	60
2	35	35	60	60	60	60	60	60	60	60	60
3		35	35	60	60	60	60	60	60	60	60
4			35	35	60	60	60	60	60	60	60
5				35	35	60	60	60	60	60	60
6											
7											
8											
9											
10											
11											
12											

Table 2: Anticipated Demographics: LEAD Southeast Elementary

% of Economically Disadvantaged Students	30%
% of Students with Disabilities	10%
% of English Learners	50%

Section 1.3 - Academic Focus and Plan

In this section:

- a. Describe the academic focus of the proposed school.
- b. Outline the academic plan of the proposed school. Include specific academic benchmarks.

At LEAD Southeast Elementary, students will build the foundational academic and social-emotional skills necessary to thrive in middle school. As we envision that this school will become the primary feeder to our middle school, we have created a fully integrated academic model that will provide students and families a seamless transition as they continue their K-12 experience. Recognizing the critical role of early intervention in shaping a student's academic journey, LEAD Southeast Elementary will place a strong emphasis on proactive measures to address challenges and support student success. Drawing from the experience of LEAD middle schools, the elementary level becomes a pivotal opportunity to intervene early and lay a solid foundation for academic growth.

Our current middle school students typically come to LEAD Southeast Middle School one to three grade levels behind, based on NWEA Map assessments. Skill deficits often include, but are not limited to, vocabulary acquisition and use, language/craft/structure, numbers and operations, and algebraic thinking. As a result, we have intentionally built our elementary model to ensure students are building these and other necessary skills in the early grades so as to thrive during the rest of their educational experience.

Our elementary school model will benefit from being part of a larger, established academic plan. There are certain elements of LEAD's academic plan that are consistent across all levels and will be implemented at LEAD Southeast Elementary. These include the following:

- Rigorous curriculum that aligns to Tennessee academic and college readiness standards and develops conceptual learning.
- Responsive learning opportunities for students by adjusting instruction based on data.
- Vertical alignment wherever possible, including with college and career exposure.
- Assurances that 100% of students receive equitable, grade-level aligned instruction, holding our school community accountable to a high level of active participation.
- A focus on closing achievement gaps, using the All Means All framework.
- A specific focus on social-emotional development. Crew is one major component of this in all LEAD schools. All students at LEAD are part of a Crew – a group of students assigned to one teacher for lessons on character traits, recent events, executive functioning skills, and real-life reflection. Crew is also a place where teachers do academic and wellbeing checks on their students to ensure that students' needs are addressed as a whole child.
- A robust coaching program for teachers to ensure they are honoring students as individuals and addressing their needs while also holding them accountable to the rigorous standards being taught and supporting their ability to master the standard through appropriate and timely scaffolds.

At the elementary level, our educational model will be built on the belief that all students can excel when given the right opportunities and support. Students will learn foundational reading and math skills, while given ample opportunities to explore and engage in new content and learning. They are encouraged to be inquisitive and apply problem-solving skills in new contexts. They will experience rigorous, standards-aligned content based in research-proven curricula designed to enhance critical thinking skills that ultimately puts them on the pathway towards college and career.

Key elements of our approach to instruction are high-quality state standards-aligned curriculum, data-driven instruction, and our overall assessment philosophy. Literacy, along with the recognition that ELA drives success in all subject areas, is a core tenet of our approach to instruction. From the beginning, LEAD Southeast Elementary will set significant resources and efforts toward supporting diverse learners, including students with IEPs and English Language Learners. Supporting teachers with robust, individualized instructional coaching also remains an important contributor to our success.

Below, we have outlined some of the core practices that will be implemented at LEAD Southeast Elementary:

- **Rigorous Curriculum:** Our commitment to academic excellence is epitomized through a rigorous curriculum that strikes a delicate balance between joy and challenge. We recognize the significance of meeting students at their Zone of Proximal Development (ZPD), ensuring that the curriculum is tailored to their individual learning needs. In our student-centered classrooms, learning is not just a task but an experience that instills a sense of joy and curiosity. For more granular details about our curriculum, please refer to Section C and D of our documentation. These sections provide a comprehensive overview of the specific subjects, learning objectives, and instructional strategies employed in our rigorous curriculum. The documentation will showcase how each subject area is aligned with state standards, incorporates research-proven methodologies, and embraces innovative approaches to enhance student learning.
- **Multi-Tiered Systems of Support (MTSS) Model:** At the heart of our approach is the implementation of a robust Multi-Tiered Systems of Support (MTSS) model. This model, guided by a dedicated network director of MTSS, encompasses expanded intervention in reading and mathematics, as well as a comprehensive behavioral support system led by a director of student support. The school-level oversight by instructional managers and assistant principals of instruction ensures a seamless integration of academic and emotional support, addressing the diverse needs of our students. Within this framework, the universal screening process utilizing the NWEA MAP as the Universal Reading Screener plays a crucial role, serving as the initial step in identifying students who may benefit from additional support. Through this systematic approach, we aim to provide personalized interventions that enable every student to thrive academically and emotionally.

In MTSS Tier 1, students scoring at or above the 26th percentile on MAP assessments, benchmarked against national norms, will be included. Their curriculum will incorporate Amplify Writing Studio and the Boost online reading platform. Additionally, they will engage with i-Ready math, providing further support and reinforcement in mathematical concepts.

MTSS Tier 2 is designated for students scoring between the 11th and 25th percentile on MAP assessments. Their intervention will utilize mCLASS, recognized as a dyslexia-specific intervention. Students in need of Tier 2 math intervention in grades K-5 will utilize Marilyn Burns' Do the Math intervention, focusing on operational fluency for all four operations.

MTSS Tier 3 is tailored for students scoring at or below the 10th percentile on MAP assessments. Similar to Tier 2, their intervention will involve the use of mCLASS as a dyslexia-specific intervention. We will use Bridges for our Tier 3 math intervention. It is structured as more intensive, shorter units of targeted instruction focused on a specific skill.

ELA & Math MTSS Tier Cut Scores	
<u>Tier</u>	<u>Universal Reading Screener MAP</u>
1	26th+ percentile
2	11-25th percentile
3	<10th percentile

ELA MTSS Tiers			
<u>Tier</u>	<u>Grade</u>	<u>Time</u>	<u>Tool</u>
1	K-2	45 minutes/daily	Writing Studio Boost Reading
1	3+	45 minutes/daily	Writing Studio Boost Reading
2	K-2	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
2	3+	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
3	K-2	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
3	3+	45 minutes/daily	mCLASS <i>*dyslexia specific</i>

Math MTSS Tiers			
Tier	Grade	Time	Tool
1	K-5	45 mins	iReady Math
2	K-5	45 mins	Do the Math
3	K-5	45 mins	Bridges

- Diverse Learners:** As student demographics evolve, LEAD Southeast Elementary will remain committed to providing additional support for diverse learners, including students with disabilities and English learners. The school will enhance its universal screening process to efficiently identify students in need of extra support, facilitating prompt progress monitoring. The collaboration between the director of exceptional education, instructional managers, and core content area directors ensures professional learning opportunities focused on differentiated instruction, behavior support, and compliance. For English learners, the school will employ a comprehensive strategy. Students will be offered opportunities to demonstrate proficiency in their home language, and the pathway to the Seal of Biliteracy will be facilitated through Avant assessments. Progress toward ACCESS growth goals will be closely monitored using internally developed formative language assessments. The school will evaluate instructional practices using internally developed EL Arcs of the Year, a document centered on best practices in ELL instruction, ensuring continuous improvement throughout the academic year.
- Foundational Reading Training:** In alignment with state law, LEAD Southeast Elementary will place a strong emphasis on foundational reading training for elementary-grade teachers up to grade 5. This training, created in partnership with TNTP and based on the TN Foundational Reading Standards, ensures that teachers are equipped with the essential principles of effective reading instruction. By investing in professional learning, the school will foster an environment where educators are well-prepared to address the diverse literacy needs of our students.
- Continuous Improvement and Collaboration:** LEAD Southeast Elementary will adopt a culture of continuous improvement, with ongoing collaboration between administrators, instructional staff, and support teams. Regular monitoring, assessment, and feedback mechanisms are integral to our approach, ensuring that interventions are responsive to individual student needs. Through our proactive measures and commitment to excellence, we aim to build a strong educational foundation for each child, setting the stage for success throughout their academic journey and beyond.
- College and Career Exposure:** In line with LEAD's Ready for Life priority, students will be exposed to and aware of different career paths and colleges.
- Teacher Development and Instructional Coaching:** Undergirding our academic model is a deep commitment to instructional coaching and teacher development. Our staffing model is most notable for the inclusion and development of multiple instructional managers and other instructional leaders. The LEAD model has one instructional leader for every 6-8 teachers. This allows our coaches to prioritize the development of our teachers through regular, ongoing feedback. This same practice will be implemented at LEAD Southeast Elementary School. More information can be found in Section 2.5.

- **Social and Emotional Learning:** An effective educational environment cannot be limited to academics; thus, LEAD Southeast Elementary will emphasize social and emotional development as well. The foundation for this growth begins with the strong relationships that our teachers build with our students to create the space for social-emotional growth. More information can be found in Section 1.8.

Additionally, the academic plan for LEAD Southeast Elementary includes specific details by grade level. Emphasis will be placed on community building and literacy skills, with a heavy focus on foundational literacy in grades K-2. Thematic units will be a feature of ELA, embedding science and social studies content in literacy through the use of the Core Knowledge Language Arts (CKLA) curriculum. Math will emphasize foundational skills through problem solving and exploration using the Eureka Squared curriculum. Students will have access to intervention as needed, and all students will engage in social and personal development work. Students will also have daily related arts including physical education, art, and music.

Student progress towards meeting academic benchmarks will be rigorously monitored through a myriad of assessments, the details of which can be found in Section 1.5 below.

- c. Describe the most important characteristics of the academic plan, including any specific educational philosophy, instructional methods, or innovations.
- d. Describe current research supporting the academic plan and how the plan will drive academic improvement for all students and help close achievement gaps.

All LEAD classrooms use best practices in each subject area and grade level.

Daily Foundational Literacy Skills Instruction in Grades K-2

LEAD Southeast Elementary literacy instruction will center on TN Foundational Skills Curriculum (TNFSC) and Amplify's Core Knowledge Language Arts (CKLA), enhancing students' reading, writing, listening, and speaking skills. The curriculum, chosen from state-approved materials, targets grades K-2 in TN Foundational Skills, focusing on print concepts, phonological awareness, phonics, word recognition, composition, spelling, fluency, and sentence construction. TNFSC, aligned with evidence-based reading research, employs a systematic and explicit instructional approach, ensuring all students acquire essential skills for proficiency.

TNFSC is defined by the following principles:

- **Explicit Phonics:** In this approach, educators clearly and systematically teach students the rules and patterns of phonics, emphasizing the direct connection between letters and sounds.
- **Synthetic Phonics:** This method involves explicit teaching of the relationship between letters (graphemes) and their associated sounds (phonemes). The focus is on blending sounds together for reading and segmenting them for spelling.
- **Intensive Practice:** Building reliability and automaticity is achieved through repeated oral practice with text aligned to the specific skills being learned.

CKLA is an educational program cultivating literacy skills through a structured approach. It emphasizes background knowledge and covers systematic instruction, rich content, vocabulary development, fluency, writing skills, grammar, reading comprehension, listening, speaking, and literacy assessments. CKLA targets reading comprehension, vocabulary building, and writing skills comprehensively.

Daily Foundational Literacy Skills Instruction in Grades 3-5

In grades 3-5, there will be an integrated reading block with dedicated time for foundational skills instruction, aligning with Tennessee ELA standards, using Amplify's CKLA curriculum. This focused instruction addresses advanced phoneme recognition, multisyllabic words, advanced word analysis, and fluency. Although developmental and cognitive perspectives on reading emphasize the strong relationship between early language skills, background knowledge, and later reading comprehension⁶, instructional materials have not consistently mirrored this understanding⁷. CKLA designed a read-aloud component (the Knowledge strand) that blends language support, vocabulary, knowledge building, and listening comprehension skill development in an integrated manner.

Within our ELA block, following an evidence-based approach, students receive comprehensive daily instruction. It includes knowledge-building and foundational skills like fluency, grammar, morphology, spelling, writing, speaking, and listening. Our curriculum actively engages students in fluency, vocabulary, and comprehension activities, seamlessly integrated within lessons for continuity. The two-strand design in K-2 refers to the fact that the CKLA program, in these grades, is organized around two distinct blocks of language arts instruction, each with its own set of activities, materials, and goals. In the Knowledge strand, oral language and listening comprehension skills are honed through interactions with complex, knowledge-based texts. In the Skills strand, time is dedicated to building decoding and word-level automaticity within controlled, decodable texts. The decision to split the instructional focus in the earliest grades is based in recent developmental models of reading that refute the notion that decoding and reading comprehension develop sequentially (Catts et al., 2012; Kendeou et al., 2009; Scarborough, 2005; Storch and Whitehurst, 2002). In grade 3, the program continues to develop skills (e.g., grammar, spelling, morphology), but the content of the Knowledge strand begins to integrate into the Skills strand in more systematic ways. There are still almost-daily read-alouds, but students also read independently about the topics introduced during the read-alouds. This serves as a bridge toward the program design in grades 4 and 5, where instruction moves away from the two-strand model toward a single, integrated language arts block. By grades 4 and 5, the focus is on fluent reading for meaning-making and the emphasis, instructionally, is on increasing efficiency and skill in the integration of word- and text-level skills, as occurs with proficient readers⁸. Although grades 4 and 5 do not have two distinct strands of materials, the premise of the CKLA design—building both knowledge and skills—is consistent across all grade levels.

In order to support all learners, mCLASS intervention program enhances educators' efficiency and effectiveness in delivering tailored instruction to struggling students in Tier 2 and 3 interventions. It begins with a comprehensive multi-battery assessment, providing a holistic view of a student's reading abilities and

⁶ Dickinson, Golinkoff, and Hirsch-Pasek, 2010; Kintsch, 1994; Neuman and Celano, 2006; Scarborough, Neuman, and Dickinson, 2009

⁷ Pianta et al., 2007

⁸ Perfetti, 2007

identifying those falling below grade-level expectations in specific skills. Utilizing a technology-driven grouping algorithm, mCLASS prioritizes grouping and instructional recommendations across various skill categories, ensuring targeted support for students aiming to meet grade- and time-specific targets.

Focusing on foundational reading comprehension skills, mCLASS incorporates measures from the Dynamic Indicators of Basic Early Literacy Skills, covering letter name knowledge, phonological awareness, decoding (both late and early), fluency (rate and prosody), and comprehension (reading and aural). Recommendations generated by the mCLASS algorithm factor in grade level and time of year, tailoring instructional prioritization accordingly. For students requiring decoding support, the algorithm begins with fundamental skills, grouping students with similar needs and providing decoding instruction aligned with tiered interventions. Students with both decoding and language comprehension needs receive concurrent support from an early stage, benefiting English Language and diverse learners from the outset.

Aligned with recommendations from the Institute of Education Sciences (IES) panel on Response to Intervention (RTI), mCLASS focuses on three or fewer skills in its instruction to prevent overwhelming students. Each intervention block, lasting 45 minutes, targets a maximum of two skills. Designed to foster growth in the five reading skills highlighted by the National Reading Panel, mCLASS tier 2 and 3 interventions emphasize phonemic awareness, alphabetic principle, vocabulary, fluency, and comprehension.

Teachers access sets of mCLASS intervention lessons tailored to their tiered groups, featuring a systematic format (introduce, model, practice) and emphasizing effective, direct instruction. Trained interventionists and teachers administer these lessons, engaging students through activities, games, and manipulatives. Progress is monitored at the end of each 10-day instructional cycle, allowing for adjustments to subsequent lesson sequences and regrouping within intervention tiers to maintain homogeneity.

A pivotal component of the mCLASS intervention program is its professional development (PD) sessions. These sessions familiarize educators with assessments, lessons, and intervention tools, enabling them to effectively utilize student performance data for planning and monitoring, engage in collaborative decision-making, and establish norms conducive to high achievement, particularly for diverse, at-risk, and economically disadvantaged students. Embedded training modules and a pedagogical help desk are integral components of the program, designed to provide ongoing support to educators. These resources not only help educators get started with the program but also serve to maximize their ability to support their students' success. Whether it's through accessing additional training materials or seeking assistance from experts via the help desk, educators have the necessary support to implement the mCLASS intervention program effectively.

mCLASS qualifies as a Tier 2 and 3 dyslexia intervention, grounded in research and employing explicit, systematic, multi-sensory that use auditory, visual, tactile and kinesthetic techniques, along with small group intervention methods. Its structured literacy lessons address foundational skill gaps before progressing to more advanced content. Benchmark and progress monitoring facilitate the assessment of student progress and inform intervention adjustments as needed.

According to research conducted by the Institute of Education Sciences (IES), K–2 students enrolled in mCLASS Intervention demonstrated up to an additional 8 student growth percentile points in early literacy skills compared to similar peers who were not part of the intervention.

LEAD Cameron Elementary is leveraging Amplify Writing Studio to enhance their MTSS ELA Tier 1 writing focus, firmly rooted in the Science of Reading and supported by thorough research to foster the development of writing proficiency. According to Graham and Perin (2017), regular writing practice among elementary students yields significant improvements in literacy skills. This includes enhancements in spelling, grammar, vocabulary development, and overall writing fluency. Engaging in writing activities not only fosters language proficiency but also enhances communication abilities which is imperative for all students.

Moreover, studies conducted by Troia and Graham (2016) and Dockter et al. (2018) reveal a positive correlation between writing proficiency and academic achievement in elementary students. Strong writing skills serve as a cornerstone for success across various subjects, supporting learning, comprehension, and the application of knowledge. Therefore, prioritizing writing within MTSS ELA Tier 1 aligns with empirical evidence suggesting its pivotal role in bolstering both literacy skills and academic performance.

The Amplify Writing Studio is a meticulously crafted program designed to cultivate adept writers across diverse academic settings. Grounded in research-based methodologies and pedagogical best practices, it guides students through a scaffolded progression of writing skills, ensuring mastery at each stage before advancing. By immersing students in various literary genres, such as narrative, expository, persuasive, and informational writing, the program fosters a comprehensive understanding of different writing styles, formats, and purposes, promoting versatility in communication.

Emphasizing the writing process, Amplify Writing Studio encourages students to engage in prewriting activities for brainstorming and organizing ideas, drafting for composition, revising for clarity and coherence, editing for grammar and mechanics, and publishing for presentation. This holistic approach not only refines their writing abilities but also fosters critical thinking and metacognitive skills essential for academic success. Leveraging modern educational technology, the program integrates digital tools and resources such as interactive writing platforms, multimedia storytelling applications, and online collaboration tools to enhance the writing experience, empowering students to express their ideas creatively while mastering digital literacy skills.

Recognizing diverse needs and learning styles, Writing Studio offers flexible instructional strategies and differentiated activities, including small group discussions, peer workshops, and individualized feedback sessions, ensuring equitable access to high-quality writing instruction for all learners. Assessment in Writing Studio focuses on authentic performance tasks and real-world writing scenarios, fostering accountability and ownership over student work through peer collaboration, self-reflection, and constructive feedback. Overall, Writing Studio serves as a transformative platform, empowering students to unleash their full potential as skilled writers, critical thinkers, and confident communicators in an ever-evolving global landscape of communication and literacy.

Key Features:

- **Scaffolded progression of writing skills:** Guiding students through a structured sequence, ensuring mastery before advancement.
- **Immersion in various literary genres:** Exploring narrative, expository, persuasive, and informational writing for comprehensive understanding.
- **Emphasis on the writing process:** Highlighting prewriting, drafting, revising, editing, and publishing for effective composition.
- **Integration of modern educational technology:** Using digital tools for interactive writing and multimedia storytelling, enhancing creativity and digital literacy.
- **Flexible instructional strategies and differentiated activities:** Adapting to diverse learning needs through small groups, peer workshops, and personalized feedback.
- **Assessment through authentic performance tasks:** Evaluating based on real-world scenarios, fostering accountability and practical application.
- **Empowerment of students through peer collaboration and self-reflection:** Encouraging ownership and confidence through collaborative learning and self-assessment.

LEAD Cameron Elementary will utilize Boost Reading, an interactive online reading program tailored for students in grades K-5, which harnesses the transformative potential of the Science of Reading to propel students' literacy skills forward. This innovative tool integrates captivating storytelling with targeted instruction in key literacy areas such as phonological awareness, phonics, decoding, fluency, vocabulary, and comprehension. Backed by research, Boost Reading has proven to significantly enhance word reading, oral reading fluency, and comprehension. During the 2020-2021 academic year, an efficacy study titled "Closing the Literacy Gap for Students in K-5," authored by Jennie Zoski, Ph.D., Steve Newton, Ph.D., and Yukie Toyama, Ph.D., demonstrated its effectiveness in advancing at-risk students and narrowing the achievement gap for English language learners, meeting ESSA's Moderate Evidence criteria.

By integrating evidence-based practices, Boost Reading offers a comprehensive approach to literacy development, ensuring that students at all levels of proficiency receive the support they need to thrive. Whether students are embarking on their reading journey or mastering complex texts, Boost Reading adapts to their individual learning needs, providing personalized instruction that fosters growth and achievement.

One of the program's key features is its flexibility, allowing students to engage independently for 30–45 minutes per week within the school setting. This structured yet adaptable approach enables students to cultivate essential literacy skills at their own pace while empowering educators to monitor progress through detailed reports.

In the academic year 2020-2021, the study "Closing the Literacy Gap for Students in K-5⁹," conducted by Jennie Zoski, Ph.D., Steve Newton, Ph.D., and Yukie Toyama, Ph.D., evaluated the efficacy of Boost Reading from kindergarten to fifth grade. The research involved over 32,000 students who used Boost Reading for at least 15 hours throughout the school year, compared to a control group of 97,000 students who did not use the online program. The findings demonstrated that students who regularly engaged with Boost Reading showed

⁹https://dam.amplify.com/m/4f3004f146ed3917/original/BR_EfficacyData_OrangePaper_032323_v1_web.pdf and https://amplify.com/pdf/uploads/2023/11/BR_EfficacyData_Flyer_111323-1.pdf

significant improvements in word reading, oral reading fluency, and comprehension. By utilizing personalized instruction and immersive storytelling, Boost Reading not only accelerates literacy development but also fosters a lifelong love of reading and learning. This study meets Tier 2 Moderate ESSA Evidence standards.

The findings revealed:

- **Advancing at-risk students:** Students starting below or well below benchmark levels and using Boost Reading were 36% more likely to reach on-track status by the end of the year compared to their non-Boost Reading counterparts.
*In kindergarten, 64% of at-risk students utilizing Boost Reading ended the year at benchmark or above compared to 48% of the comparison group.
- **Narrowing the achievement gap for English language learners (ELs):** ELs beginning the year below benchmark levels were 43% more likely to attain on-track status by year-end if they utilized Boost Reading.
*Among kindergartners, 62% of ELs identified as at-risk who participated in Boost Reading achieved benchmark or higher by the end of the year, whereas only 47% of the comparison group reached this level.
- **Meeting ESSA's Moderate Evidence criteria:** The study met the criteria for ESSA's Moderate Evidence tier, demonstrating significant and positive effects on student outcomes across all grades.

LEAD Southeast Elementary will facilitate math learning where students develop an understanding of concepts while building proficiency with key skills and learning to solve complex problems. This is done through the use of Eureka Squared, a comprehensive PK-5 curriculum that blends direct instruction, structured investigation, and open exploration. Students engage in four integrated components: Fluency Practice, Concept Development, Application Problem, and Student Debrief. Eureka Squared also has an intervention program that will be used to remediate and accelerate individual students' learning as needed.

In science classes at LEAD Southeast Elementary, students will build habits of scientists and engineers by exploring real-world phenomena, collecting evidence to analyze and craft complex explanations, and applying what they've learned in new contexts. The curriculum, Amplify Science, accomplishes this through its emphasis on coherence, real-world problems and roles, and a *Do, Talk, Read, Write, Visualize* approach. Each of these components is critical to student learning:

- The third International Association for the Evaluation of Educational Achievement's Trends in International Mathematics and Science Study (TIMSS) identified curricular coherence as a major predictor of student performance¹⁰. A curriculum that is coherent supports learners over time in building and linking ideas in order to develop an integrated understanding¹¹.
- Each Amplify Science unit introduces students to a realistic problem that they must solve by developing the ability to explain a surprising or mysterious phenomenon. The focus on "understanding

¹⁰ Schmidt, Wang, & McKnight, 2005

¹¹ Fortus & Krajcik, 2012; National Research Council, 2000

phenomena” rather than on “teaching topics” provides structure and context to student investigations. Students also take on the role of a specific type of science or engineering professional, such as a food scientist or structural engineer, in order to solve problems facing the real world today. Such authentic learning experiences have been widely demonstrated to increase cognitive engagement in science learning¹².

- Three third-party gold standard studies (Cervetti, Barber, Dorph, Pearson, & Goldschmidt, 2012; Duesbury, Werblow, & Twyman, 2011; Wang & Herman, 2005) provide evidence that students who learn through the *Do, Talk, Read, Write, Visualize* approach achieved more. Independent research groups, including The National Center for Research on Evaluation, Standards, and Student Testing at UCLA, compared students learning science through the *Do, Talk, Read, Write* approach to whatever curriculum was currently being used. Students using our *Do, Talk, Read, Write* approach benefited in a variety of ways.

LEAD Southeast Elementary social studies classes will use Gallopade to focus on Tennessee Academic Standards in a way that engages students in a multi-sensory learning experience. Gallopade blends interactive print and digital tools with literacy enhancement builders. Two impactful, research-backed approaches are its use of “small bites” and authentic assessments. Gallopade Curriculum incorporates continuous cycles of interactive learning by design throughout each “small bite” to maximize the efficiency of learning through understanding of the Cognitive Load Theory (CLT) and its effect on the learning process. Gallopade Curriculum incorporates the use of authentic assessments to determine the results of instruction. Authentic assessments measure the depth of learners’ comprehension and understanding, providing insight into the success of the learning process¹³.

Academic programming across all grade levels will also feature the following:

- Related arts, where teachers provide a holistic education that focuses on student expression, engagement, and growth. Related arts teachers create individualized content that challenges students to be independent, while learning new knowledge and skills.
 - Acceleration and intervention in addition to grade-level curriculum to help mediate the effects of learning loss from remote learning and close any gaps that may exist from prior learning situations.
 - Utilization of Crew and collective identity practices to build community, students’ sense of belonging, executive functioning skills, and strong social and emotional skills needed to be a successful participant in learning and succeed in life.
- e. 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.

¹² Blumenfeld, Kempler, & Krajcik, 2006; Potvin & Hasni, 2014

¹³ Pilcher, 2012

Grades K-5 will operate in self-contained classrooms to ensure the consistent teacher-student relationship, allowing for personalized instruction, smoother transitions between subjects, and the development of a cohesive classroom community. This approach facilitates holistic learning, behavioral management, and flexibility in curriculum adaptation to cater to individual student needs. Special education teachers, English language teachers, and interventionists will deliver personalized instruction to a diverse range of learners through small group and individual sessions. The LEAD Public Schools Network Support Team (NeST) will offer assistance for core content areas and special populations throughout the academic year.

Literacy instruction will be anchored in the Core Knowledge Language Arts (CKLA) program and TN Foundational Skills Curriculum (TNFSC), aiming to enhance reading, writing, listening, and speaking skills in students. CKLA and TNFSC are educational programs designed to foster robust literacy skills through a structured and cumulative approach to skills and content. CKLA underscores the significance of background knowledge in literacy development. The TNFSC and CKLA literacy programs encompass systematic instruction, rich content, phonics and decoding, vocabulary development, listening and speaking, fluency, writing skills, reading comprehension strategies, cultural literacy, and literacy assessments.

Key elements of our rigorous curriculum include:

- **Approved by Tennessee Department of Education:** All our curricular choices are fully aligned and correlated to the TN Academic Standards and have been approved by both the Tennessee State Textbook and Instructional Materials Quality Commission.
- **Zone of Proximal Development (ZPD):** The curriculum is carefully designed to align with the ZPD of each student, providing a scaffolding approach where they can experience both challenge and success. Differentiated instruction is a cornerstone, allowing teachers to tailor their approach to the unique learning styles, strengths, and areas of growth for each student.
- **Student-Centered Approach:** Our classrooms are dynamic, fostering a student-centered environment where active engagement and critical thinking are encouraged. Students take ownership of their learning journey, actively participating in discussions, collaborative projects, and hands-on activities that enhance their understanding and application of concepts.
- **Hands-On Learning and Problem Solving:** The curriculum places a strong emphasis on hands-on learning experiences that go beyond traditional textbook methods. Problem solving is woven into every aspect of the curriculum, challenging students to apply theoretical knowledge to real-world scenarios. This approach cultivates a mindset of curiosity, resilience, and adaptability.
- **Building Strong Communication Skills:** Communication skills are paramount in preparing students for success in college and life. Our curriculum places a deliberate focus on reading, writing, listening, and speaking. Reading programs are designed to develop literacy skills, with a diverse selection of materials to cater to various interests and reading levels. Writing assignments range from creative expression to analytical essays, ensuring students can effectively convey their thoughts and ideas.

Details about the structure of each curriculum can be found below:

ELA	<table><tr><th>Tier 1</th><th>Time</th><th>Description</th></tr><tr><td>Grades K-2</td><td>150 minutes daily</td><td> - Includes minimum of 60 minutes foundational skills utilizing TN Foundational Skills Curriculum. - Focused on print concepts, phonological awareness, phonics and word recognition, word composition/spelling, fluency, and sentence composition. 90 minutes CKLA curriculum instruction. - Focused on reading, writing, grammar, speaking, and listening skills. <i>*60 minutes of EL student support during core content time.</i> <i>*90 minutes of uninterrupted instructional time.</i> </td></tr><tr><td>Grades 3-5</td><td>120-150 minutes daily</td><td> - Includes minimum of 30 minutes foundational skills utilizing CKLA foundation skills. - Focused on advanced phoneme recognition, multisyllabic words, advanced word analysis, and fluency. 90 minutes CKLA curriculum instruction. - Focused on reading, writing, grammar, speaking, and listening skills. <i>*60 minutes of EL student support during core content time.</i> <i>*90 minutes of uninterrupted instructional time</i> </td></tr></table>	Tier 1	Time	Description	Grades K-2	150 minutes daily	- Includes minimum of 60 minutes foundational skills utilizing TN Foundational Skills Curriculum. - Focused on print concepts, phonological awareness, phonics and word recognition, word composition/spelling, fluency, and sentence composition. 90 minutes CKLA curriculum instruction. - Focused on reading, writing, grammar, speaking, and listening skills. <i>*60 minutes of EL student support during core content time.</i> <i>*90 minutes of uninterrupted instructional time.</i>	Grades 3-5	120-150 minutes daily	- Includes minimum of 30 minutes foundational skills utilizing CKLA foundation skills. - Focused on advanced phoneme recognition, multisyllabic words, advanced word analysis, and fluency. 90 minutes CKLA curriculum instruction. - Focused on reading, writing, grammar, speaking, and listening skills. <i>*60 minutes of EL student support during core content time.</i> <i>*90 minutes of uninterrupted instructional time</i>
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Math	Eureka Squared is a comprehensive PK–5 curriculum that equips teachers to fully address state standards in a rigorous, engaging, and accessible manner. Students gain a deep conceptual understanding of numbers and the ability to solve complex problems. The curriculum is composed of four distinct but integrated components: Fluency Practice, Concept Development, Application Problem, and Student Debrief. A unique blend of direct instruction, structured investigation, and open exploration. K-5 Components: LEAD Southeast Elementary Math Timings									

Grade	Minutes	Overview
K-1	60	5 mins-Fluency 10 mins-Lesson Launch 40 mins-Concept Development/Application 5 mins-Lesson Land
2	75	10 mins-Fluency 15 mins-Lesson Launch 40 mins-Concept Development/Application 10 mins-Lesson Land
3-5	90	10 mins-Fluency 20 mins-Lesson Launch 50 mins-Concept Development/Application 10 mins-Lesson Land

A Eureka Squared class is 80 minutes and features a combination of whole group, small group, and independent activities.

- **Fluency Practice:** Almost all lessons begin with this component to support development of fluency skills for maintenance (staying sharp on previously learned skills), preparation (targeted practice for the current lesson), and/or anticipation (skills that ensure that students will be ready for the in-depth work of upcoming lessons). This component provides daily opportunities for students to gain confidence and motivation for continued learning.
- **Concept Development:** This component addresses the new content being studied. Therefore, it is often allotted the majority of the instructional period to give students time for discussion and reflection. The concept development is generally composed of carefully sequenced problems centered within a specific topic to begin developing mastery via gradual increases in complexity. It is also accompanied by an additional set of carefully crafted problems called the “problem set.” Teachers are encouraged to make choices within this set of problems to provide their students with generally about 10 minutes of additional practice.
- **Application Problem:** In most lessons, this component is included to provide students with an opportunity to apply their skills and understandings in new ways. Sometimes the application precedes the concept development, functioning as a springboard into the new learning of the day. Often the application follows the concept development as an extension of learning.

	● Student Debrief: Every lesson closes with this critical component in which the teacher engages students in a whole-group discussion, challenging them to share their thinking and draw conclusions. This allows the teacher to gauge student understanding of the concept of the lesson, offering another chance for students to gain understanding before attempting the exit ticket.
Science	Amplify Science is a K-8 science curriculum that blends hands-on investigations, literacy-rich activities, and interactive digital tools to empower students to think, read, write, and argue like real scientists and engineers. LEAD Southeast Elementary will utilize Amplify Science in Grades K-5. Lesson Components: ● 60 minutes ● In every unit, students take on the roles of scientists and engineers to figure out real-world phenomena. To investigate these phenomena, students collect evidence from multiple sources and through a variety of modalities. They move back and forth from first hand investigation to secondhand analysis and synthesis, formulating an increasingly complex explanation of the target phenomenon. Each unit also provides students with opportunities to apply what they have learned to solve new problems in different contexts. This enables students to demonstrate a deep understanding of phenomena and practices. ● Learning Progression - Students using the Do-Talk-Read-Write approach saw clear growth along learning progressions from pre-unit assessments to end-of-unit assessments. Hands-on learning is integrated into every unit through hands-on investigations that are critical to achieving the unit's learning goals and deepening students' understanding of the unit phenomena.
Social Studies	Gallopade Gallopade includes both online and print versions to ensure that our teachers have a variety of resources on a daily basis. This curriculum benefits our educators by providing comprehensive materials, which includes a variety of activities that address various thinking domains and learning styles of students. The activities are standardized in each unit, allowing students numerous "at bats" with social studies practices through the study of historical and modern events and concepts.

	Gallopage's materials include a mixture of primary and secondary sources such as first-hand accounts, graphic representations, maps, and artifacts. Alongside these sources, the materials include inquiry-based and critical thinking questions that deepen the students' understanding of the standards beyond the recollection of names, dates, and terms. Each grade level's materials are appropriately rigorous for the age range and also offer extensions for students who are ready. Students interact with primary and secondary sources, photographs, maps, and videos to learn the content. Informational reading is also provided on two different reading levels to allow for differentiation. To practice and solidify these concepts, students engage in writing prompts, interactive read-alouds, and additional independent practice.
Reading Intervention	Our intervention approach is anchored by a proactive, early-warning system called Student Needs Assessment Protocol process for Academics (SNAP-A) coupled with scientifically-based strategies to provide swift and targeted responses. SNAP-A will be our ongoing tool to monitor students who need academic interventions throughout the year. We emphasize goal setting and implement rigorous progress monitoring, ensuring rapid growth for every student through our Individual Growth Goal process. Our goal is for students to navigate through interventions efficiently, either progressing towards Tier 1 proficiency or receiving the additional support necessary for their success. Our dynamic program is unwavering in its commitment to propel <i>all</i> learners to, and beyond, grade level, creating the foundation for sustained academic achievement. <u>Reading Intervention</u> ● MTSS ELA Tier 1: LEAD Southeast Elementary will be integrating Amplify Writing Studio into their MTSS ELA Tier 1 program, rooted in the Science of Reading and backed by research. The program focuses on developing writing proficiency, aligning with studies that show improved literacy skills through regular writing practice. Amplify Writing Studio guides students through various writing genres, emphasizing the writing process and leveraging technology for enhanced learning experiences. Flexible instructional strategies and authentic assessments ensure equitable access to high-quality instruction, empowering students to become skilled writers, critical thinkers, and confident communicators. <u>Key Features:</u>

- Scaffolded writing skills progression: Guides mastery before advancement.
- Immersion in literary genres: Explores narrative, expository, persuasive, and informational writing.
- Emphasis on writing process: Highlights prewriting, drafting, revising, editing, and publishing.
- Integration of modern tech: Uses digital tools for interactive writing and multimedia storytelling.
- Authentic performance task assessment: Evaluates real-world scenarios, fostering accountability.

LEAD Southeast will also implement Boost Reading during MTSS ELA Tier 1, an interactive online program tailored for K-5 students, leveraging the Science of Reading to enhance literacy skills. This innovative tool integrates storytelling with targeted instruction in key areas such as phonological awareness and comprehension, backed by research showing significant improvements in word reading and fluency. Boost Reading's effectiveness in advancing at-risk students and English language learners has met ESSA's criteria, offering a flexible approach adaptable to individual learning needs. With regular engagement, students experience notable enhancements in reading skills, fostering both academic achievement and a love for learning.

Key Features:

- Tailored for Grades K-5
- Science of Reading Integration
- Research-backed Effectiveness
- Advancing At-risk Students: 36% higher likelihood of reaching on-track status
- Narrowing Achievement Gap for ELs: 43% more likely to attain on-track status
- Comprehensive Approach
- Personalized Instruction
- Flexibility: 30–45 minutes per week, adaptable to schedules

- Progress Monitoring: Detailed reports for informed decisions

- Meets ESSA Criteria

- **MTSS ELA Tier 2 & 3:** mCLASS enhances educators' efficiency in delivering tailored Tier 2 and 3 instruction through a comprehensive assessment, technology-driven grouping, prioritization of foundational reading skills, systematic instruction, progress monitoring, professional development sessions, ongoing support resources, and a research-backed dyslexia intervention, leading to up to 8 additional student growth percentile points in early literacy skills.

Key Features:

-Assessment and Grouping: Employs a technology-driven algorithm for grouping and instructional recommendations, ensuring targeted support for students striving to achieve grade-specific targets.

- Skills Covered: Focuses on foundational reading skills: letter knowledge, phonological awareness, decoding, fluency, comprehension.

-Instructional Prioritization: Considers grade level and prioritizes instructional needs, beginning with fundamental skills to support decoding.

-Instructional Approach: Each 45-minute block limits targets a maximum of two skills per session.

-Lesson Delivery: Tailored lessons, featuring a systematic format, are administered by trained interventionists and teachers through engaging activities.

-Progress Monitoring: Monitors progress every 10-day cycle, allows adjustments and regrouping.

-Dyslexia Intervention: Employs multi-sensory techniques to address skill gaps before advancing.

Tier 2 and 3 Progress Monitoring:

	LEAD Southeast Elementary will be using FastBridge to facilitate progress monitoring through its frequent assessments, data collection, and reporting features. Educators administer benchmark and progress monitoring assessments regularly to capture students' academic performance and growth. FastBridge then generates detailed reports, offering insights into individual and group progress, strengths, and areas for improvement. These reports empower educators to make informed decisions about instructional strategies, interventions, and Response to Intervention (RTI) implementation, ensuring that students receive the support they need to succeed academically. -Progress monitoring will be utilized to assess the students academic performance, to quantify the student's rate of improvement or responsiveness to instruction and evaluate the effectiveness of instruction. -Progress monitoring will be conducted with measures that are at a student's skill/instructional rate. -Progress monitoring will take place at a frequency of every other week. -Students will also be progress monitored at grade level to monitor the students progress toward grade level expectations. -Progress monitoring on grade level must occur at least once a month in addition to instructional level progress monitoring. -All progress monitoring will be reported according to national percentiles. -We will use FastBridge data to communicate progress and/or concerns to students and families regularly. -We will collect, analyze, and respond to this data quickly to move students forward rapidly. -These dynamic and frequent updates to our flexible grouping strategies are always informed by current data to ensure that every student receives the tailored support they need to progress swiftly towards Tier 1 proficiency. -All teachers will be trained in the foundational literacy courses for TN and will use those strategies across all tiers of instruction. ■ K-2 will focus on phonics and phonemic awareness to ensure they have the decoding and word attack skills needed to read fluently and independently.

- 3-5 will focus on phonics (as needed) and provide more specific support with comprehension to make meaning of what they are reading.

ELA MTSS Tier Cut Scores	
<u>Tier</u>	<u>Universal Reading Screener MAP</u>
1	26th+ percentile
2	11-25th percentile
3	<10th percentile

ELA MTSS Tiers			
<u>Tier</u>	<u>Grade</u>	<u>Time</u>	<u>Tool</u>
1	K-2	45 minutes/daily	Writing Studio Boost Reading
1	3+	45 minutes/daily	Writing Studio Boost Reading
2	K-2	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
2	3+	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
3	K-2	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
3	3+	45 minutes/daily	mCLASS <i>*dyslexia specific</i>

Math Intervention

Math Intervention

According to studies by Gersten, Newman-Gonchar, and Dimino (2017) and Vaughn, Roberts, and Klingner (2016), small-group instruction is an effective component of Tier 2 and Tier 3 math interventions. Working in small groups allows for targeted instruction, personalized feedback, and peer collaboration, which can enhance students' understanding and engagement. Both intervention curricula include these components and provide specific support for language acquisition and the development of mathematical concepts that will close the gap between their current performance and Tier 1 math expectations.

- Students falling in Tier 1 for math will get their 60 mins of Eureka Math, then will get personalized instruction using iReady. Research by Rupp et al. (2019) found that elementary students participating in adaptive skills-based math programs showed significant improvements in math achievement scores compared to students in traditional programs. The adaptive nature of the programs allowed for personalized learning experiences tailored to students' individual needs, leading to enhanced academic outcomes.
 - iReady is responsive and adaptive to students needs
 - It provides intervention or extension based on student need
 - iReady provides actionable data points to inform teacher instruction
 - iReady gives opportunities to apply math skills and concepts using technology in an engaging way

- Students in need of Tier 2 math intervention in grades K-5 will utilize Marilyn Burns' Do the Math intervention.
 - The program aligns to our Tier 1 Eureka Math by developing mathematical conceptual understanding, procedural skills, and computational fluency.
 - There is a strong focus on the Numbers and Operations standards to build the numerical reasoning needed for success in later and more complex math.
 - The program is scaffolded and driven by questions and practice so that teachers can easily see and respond to misconceptions.
 - We will use FastBridge to conduct frequent progress monitoring and will communicate progress and/or concerns to students and families regularly.
 - We will collect, analyze, and respond to this data quickly to move students forward and get our students at or as close to Tier 1 as they can be.
 - Intervention will focus on operational fluency for all four operations.
 - We will focus on modeling and making meaning of math concepts with a heavy emphasis on place value and numerical reasoning skills.
 - We will focus on vocabulary to build their ability to speak and write mathematically.

- We will use Bridges for our Tier 3 math intervention.

	○ Structured as more intensive, shorter units of targeted instruction focused on a specific skill ○ It provides easy to understand visuals that make learning more accessible for those with emerging language or any student needing more visual support ○ Bridges uses cooperative learning with pairs and small groups to reinforce concepts and stimulate discussions around early math concepts ○ Teacher models efficient mathematical thinking through visual models and think alouds ○ Bridges uses hands on manipulatives through engaging games to give students opportunities to apply and practice the skills in context ○ We will use FastBridge to conduct frequent progress monitoring and will communicate progress and/or concerns to students and families regularly.																				
Targeted Intervention Approach	All students will take beginning of year screeners and ongoing assessments that the team will use to make decisions about intervention mode and frequency. They will use data from various sources included in our SNAP-A process to get an accurate and complete assessment of what a student currently can and cannot do. All students will take the MAP assessment as the universal screener for ELA and Math→ Any student scoring below the 25th percentile on those assessments will get a secondary screener. We will use FastBridge for our secondary screener for both ELA and math. <table><tr><th>Tier</th><th>Screener Score</th></tr><tr><td>1</td><td>26th+ percentile</td></tr><tr><td>2</td><td>11-25th percentile</td></tr><tr><td>3</td><td><10th percentile</td></tr></table> <table><tr><th>Tier</th><th>Grade</th><th>Time</th><th>Tool</th></tr><tr><td>1</td><td>K-5</td><td>45 mins</td><td>iReady Math</td></tr><tr><td>2</td><td>K-5</td><td>45 mins</td><td>Do the Math</td></tr></table>	Tier	Screener Score	1	26th+ percentile	2	11-25th percentile	3	<10th percentile	Tier	Grade	Time	Tool	1	K-5	45 mins	iReady Math	2	K-5	45 mins	Do the Math
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Tier	Grade	Time	Tool																		
1	K-5	45 mins	iReady Math																		
2	K-5	45 mins	Do the Math																		

	3	K-5	45 mins	Bridges

- f. 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?

A critical component of an effective curriculum is that it honors and reflects diverse identities. This is important so students see themselves in the work they are doing, are exposed to multiple perspectives, and have opportunities to learn new material in the context of the more familiar¹⁴. With this importance in mind, LEAD has chosen each of its curricula in part because they honor and reflect diverse identities, and it is something students notice. More than 76% of LEAD students across our network stated in the Fall 2022 Student Survey that they agree or strongly agree that what they learn in school reflects their culture and values.

CKLA was created with several core ideas as its driving force. In particular, the core ideas of Equity and Inclusion, Embedded Social Emotional Learning, Knowledge-Rich Substantive Content, and Students Own Their Learning reflect key principles of culturally responsive teaching. Within Equity and Inclusion, EL (n.d.) states, "... the curriculum presumes English language learners and students of varying abilities are fully participating members of a diverse and heterogeneous classroom structure, while honoring some learners' need for targeted instruction and additional support." In its section on Embedded Social Emotional Learning, EL (n.d.) also states the following: "Opportunities are integrated for students to contribute to a better world, putting their learning to use as active citizens, working for social justice, environmental stewardship, and healthy, equitable communities." Real-world knowledge is also built through grade-level texts written by diverse authors.

Eureka Squared supports LEAD's priority of including and honoring families as key members of their children's education by making all curriculum resources available in Spanish, including family-facing elements like letters home. The newest edition of the program specifically names diversity, equity, and inclusion as an emphasis. Additionally, throughout the program, students find that they are encouraged to and supported with accessing problems by utilizing a variety of tools like manipulatives.

- g. Explain how the academic plan aligns with Tennessee's academic standards and how will the school incorporate foundational literacy.

The Tennessee Academic Standards are the basis for all curriculum and materials used at LEAD. Substantial training is provided before the school year starts to ensure teachers are clear on the learning required of each standard and how the curriculum and materials provide the avenues for that learning to happen. Coaching and

¹⁴ Hammond, 2015

walkthroughs throughout the school year ensure standards remain the cornerstone of each lesson and interim assessments throughout the year measure student learning toward the Tennessee Academic Standards.

Tennessee ELA standards emphasize the integration and spiraling of reading, writing, speaking, and listening. Early grades lay the foundation for reading and writing. CKLA boasts building knowledge through literacy, engaging in deep analysis, and expanding thinking through writing. It also includes structured phonics in K-2 to lay the foundation for this work.

Tennessee math standards (2018) emphasize conceptual understanding, procedural fluency, and application, all of which are hallmarks in Eureka. Eureka specifically names how it targets conceptual understanding, procedural fluency, and application in the content. Crosswalks between the curriculums and Tennessee Academic Standards are also referenced often at LEAD as teachers unpack upcoming units and lessons.

- h. Provide the foundational literacy skills plan for the proposed school as [Attachment A](#).

Question i is REQUIRED for applicants proposing a blended learning model

- i. 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.

In Grades 3-5, Dreambox Math will be used during math intervention for students who don't qualify for Tier II or Tier III intervention. Dreambox Math is aligned to Tennessee Academic Standards and is adaptive to ensure students master grade-level content and have opportunities to remediate concepts where needed, as well as practice more challenging content as they are ready.

In Grades 3-5, Accelerated Reader will be used to track and reward students for their independent reading. There will be school-based incentives for students to promote a love of learning and ensure students are always working on reading comprehension.

Question j is REQUIRED for Category 3 and Category 4 sponsors

- j. 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.

Key features of LEAD's academic plan for LEAD Southeast Elementary will not differ from its existing school portfolio. Instead, there will be more intensity and focus ensuring implementation in a manner developmentally appropriate for elementary school. For example, in grades K-2, there will be longer ELA and math blocks and a strong focus on foundational reading skills. We believe that dedicating additional instructional time in ELA and math at LEAD Southeast Elementary is essential to ensure its success. Additionally, LEAD remains committed to being responsive to the community, collaborating with families to develop programming and traditions unique to the families we serve.

Section 1.4 - Academic Performance Standards

In this section:

- a. Describe the proposed school's annual and long-term academic achievement goals.
- b. Describe how the annual and long-term academic goals align with the department and authorizer's model performance framework.

LEAD Southeast Elementary performance goals match those of the authorizer. Our overarching goal is to meet or exceed standards on the MNPS framework in every category. Specifically, our long-term goals include:

- **Absolute Achievement:** LEAD Southeast Elementary School will meet or exceed the standard on the MNPS framework in all subject areas, especially in ELA and math. Long term, students will achieve at or above district average for all tested subject areas. LEAD Southeast Elementary School will do this through a rigorous, standards-aligned curriculum, an expanded focus on intervention, a strengthened coaching structure dedicated to teacher improvement, and a robust data-driven instruction model that both informs and improves instruction.
- **Growth:** LEAD Southeast Elementary School will be a Level 4 or 5 school for overall composite growth each year after the first year that TVAAS is measured for the school. LEAD Southeast Elementary School will do this through a continued focus on meeting each child where they are and working with them to improve not only their grade-level performance but their standards-level mastery. LEAD Southeast Elementary School will use MAP as the main tool to determine whether or not we are on track to meeting our growth goal.
- **Chronic Absenteeism:** LEAD Southeast Elementary School will exceed the standard for K-8 chronic absenteeism rates.
- **School Culture Metrics:** Additionally, the school will meet or exceed standards in school culture metrics, including:
 - Suspension rate: We will suspend less than 3% of our students. We will do this by offering a number of alternatives to suspension within the school day, partnering with families to impress upon them the importance of our school expectations, and working with teachers and students to create positive and meaningful relationships that will contribute to decrease in suspension rates and maintain low expulsion rates.
 - Student attrition: Our goal is to retain 85% of students whose primary address remains in our geographic zone and to retain at least 75% of students overall. See the Recruitment section below for details on our plan to limit student attrition.
 - Teacher retention: Our goal is to retain a minimum of 75% of teachers year over year and 85% or more of teachers designated as "effective" in our evaluation system.
 - Student attendance: Our goal is to have 94% or greater student attendance.

To achieve these long-term academic goals, we also set internal metrics that allow us to monitor our progress towards our year-end goals. Our internal goals also allow us to assess progress for non-tested elementary grades. These internal goals include:

- **Subgroup performance:** The gap between each sub-group and the general population for each of the goals listed above will be no more than 5 percentage points above or below. We will do this through targeted professional learning for teachers focused on lesson planning with diverse learners in mind. We will monitor our progress towards our goal through analysis of Interim Assessments (IAs) data as well as through analysis of MAP data and our progress towards growing our students in the lowest quintiles at a rate well above their expected one year growth goal.
- **English Language Proficiency Assessment (ELPA):** In alignment with Tennessee state guidelines for the performance of active English Learner (EL) students, we have established ELPA goals, aiming for a minimum of 60% of our students to achieve adequate growth each year. LEAD Southeast Elementary School will meet its Annual Measurable Objective target through a robust ELL model that is supported by a school-level coach and network team.
- **Reduction of students in Tier 2 and Tier 3 intervention in reading and math:** Expanded math and reading intervention programs have allowed us to engage more students in intervention to build essential foundational skills in reading and math. We will meet our goal of increasing the percentage of students exiting Tier 2 or Tier 3 reading and/or math intervention by 5% each year. Key to success in reaching this goal is in-depth training in the components of our reading and math intervention curricula as well development of strong knowledge of essential reading and math skills.
- **Sixty-five percent or more of students will meet their individual growth goals (IGGs) on MAP:** After each administration of MAP, data are reviewed not only to determine individual student progress towards meeting growth goals, but also to analyze the percentage of students within each quintile. Through reading and math intervention, it is our expectation that we will increase the percentage of students meeting yearly growth goals and, in turn, increase the percentage of students demonstrating proficiency at or above grade level as compared to their peers nationally.
- **Above average growth in the bottom 25% of students**
- **Sixty-five percent or more of students will reduce their needs score in the Student Needs Tracker:** LEAD's Student Needs Tracker provides school teams with student data in the areas of grades, attendance, and behaviors. In essence, it serves as LEAD's early warning system. Each student is assigned a student risk score based on their need in each of the areas listed above. School teams engage in the Student Needs Analysis Protocol (SNAP) process to determine students with the highest needs and to choose interventions to address those needs. Data are analyzed each mid-quarter, and progress toward meeting intervention goals is monitored and reviewed at each meeting. Based on student success, interventions can remain in place, be discontinued, or be revised.
- **Family engagement:** 100% of families successfully engaged (one touchpoint a year) and 60% meaningfully engaged (at least three touch points a year)
- **Student belonging:** Meet internal benchmarks set by the network for feelings of student belonging and reported respectful student-staff interactions as indicated on the student survey
- **Staff engagement:** Ninety percent of our teachers and staff will be engaged, per our internal staff survey
- **Financial and operational metrics:** LEAD will meet standards in all financial and operational indicators

c. Describe the process for setting, monitoring, and revising academic achievement goals.

The process for setting, monitoring, and revising academic achievement goals at LEAD is a structured and collaborative endeavor, rooted in the commitment to academic excellence. Annually, the network academic team, school leadership team, and heads of schools join forces to set clear and measurable academic goals for the upcoming school year. This involves a thorough examination of academic data, including NWEA MAP, Fastbridge, LEAD Network Interim Assessments, Unit Assessments, TNReady, and other relevant data points.

Throughout the academic year, continuous monitoring of progress towards these goals occurs. The network academic team, school leadership team, and heads of schools utilize dashboards and various assessments such as interim assessments, formative language assessments, MAP, Fastbridge, and formative assessment data to gauge and track advancements. Collaboratively, the network data and academic teams employ Looker Studio for high-level network analysis, examining correlations and trends across multiple assessments. The insights derived from these analyses guide decision-making processes and goal-tracking at both the network and school levels. Additionally, the network academic team takes the lead in coordinating training sessions for school leadership teams, imparting analysis methods and decision-making protocols.

At the core of LEAD's initiatives lies a strong commitment to student outcomes and data analysis. Utilizing Mastery Connect, LEAD conducts standard-level, question-level, and subgroup analyses to inform instructional decisions. Teachers, in collaboration with LEAD coaches, establish yearly and quarterly goals centered around student proficiency and growth. A weekly stack audit ensures a continuous focus on student outcomes, prompting adjustments to instructional strategies. As a network-wide practice, LEAD embraces quarterly data days, providing teachers with dedicated time for in-depth data exploration and collaboration. Common assessments administered the week before data days facilitate comprehensive analysis, allowing leaders to prepare thoroughly for meaningful interactions with teachers. This structured approach ensures consistent grading norms across classrooms and fosters an environment where student success remains the central focus.

Collaborative analysis plays a pivotal role, with high-level network analysis conducted using tools like Looker Studio. This involves examining correlations and trends across multiple assessments, guiding decision-making processes at both the network and school levels. The network academic team takes the lead in coordinating training sessions for school leadership teams, imparting analysis methods and decision-making protocols. This collaborative learning ensures that leaders are well-equipped to interpret data effectively.

Revisions to academic goals are an integral part of the process and are driven by ongoing assessment and feedback from various tools. The emphasis remains on data-driven revisions, ensuring that adjustments are made based on accurate and up-to-date information. The use of Mastery Connect for standard-level, question-level, and subgroup analyses is central to decision-making, complemented by regular stack audits conducted by LEAD instructional managers, ensuring a constant focus on student outcomes and guiding instructional pivots as needed.

Quarterly data days provide dedicated time for teachers to deeply explore data and collaborate, supported by common assessments administered before these days to facilitate in-depth analysis. This comprehensive and

cyclical process establishes a culture of accountability, collaboration, and an unwavering focus on improving academic achievement for all students at LEAD.

- d. How do these goals align with academic achievement goals within the authorizer/state model performance framework and the proposed community you plan to serve?

LEAD's academic achievement goals are aligned with the expectations set forth in the authorizer/state model performance framework. By adhering to educational standards and utilizing a data-driven approach, LEAD ensures that its objectives resonate with the broader guidelines established by the state. Beyond the goals set by the authorizer, our internal goals are responsive to our community by including additional metrics on subgroup performance, family engagement, and staff engagement. LEAD's commitment to equity and inclusion is evident in its consideration of diverse student needs, encompassing those with disabilities and English learners, thereby fostering an educational environment that is both inclusive and equitable for all community members.

- e. Describe corrective action plans if the school falls below state, district and/or its own academic achievement goals.

In the event of the school falling below state, district, or its own academic achievement goals, LEAD has devised a comprehensive corrective action plan to systematically address the identified challenges and propel the school toward improvement. This multifaceted plan begins with a rigorous root cause analysis, which requires delving into data, student outcomes, and instructional practices to pinpoint the factors contributing to the academic performance gap. The development of this plan is a collaborative effort, involving key stakeholders such as the network academic team, school leadership team, and heads of schools, ensuring diverse perspectives and expertise are considered. Data-driven interventions are then incorporated, tailored to the specific challenges identified, which will include adjustments to instructional strategies, targeted professional development, or additional support for students in need. Continuous monitoring and evaluation play a crucial role in the process, allowing for ongoing adjustments and refinements to the plan. LEAD places a strong emphasis on professional development to enhance educator capacity, student-specific support plans for those needing extra assistance, and family and community engagement as integral components of the corrective action plan. The overarching goal is to foster a continuous improvement culture, learning from setbacks, revising academic goals if necessary, and maintaining an unwavering commitment to academic excellence.

- f. 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.

LEAD Southeast Elementary will be dedicated to tackling academic underperformance and learning loss through a comprehensive approach aligned with Tennessee guidelines, particularly the Response to Instruction and Intervention (RTI²) framework. The school will initiate early identification and assessment processes, employing tools such as NWEA MAP, Fastbridge, and other relevant assessments. The implementation of a Multi-Tiered Systems of Support (MTSS)

model, led by a director of MTSS and a director of student supports, will ensure a tiered approach to intervention, addressing individual student needs through personalized support. Collaborative decision-making involving key stakeholders facilitates a collective understanding of student requirements and effective planning for interventions. Data-driven interventions, informed by formative assessments and other data points, will guide the selection and customization of strategies to address specific learning gaps. The school will support diverse learners with targeted professional learning, particularly in differentiated instruction and behavior support. Additionally, foundational reading training, aligned with state standards, will ensure a strong reading foundation for elementary grade teachers. Individualized student support plans will be developed for those requiring additional assistance, incorporating differentiated instruction and targeted tutoring. Continuous monitoring and adjustment, quarterly data days, and ongoing collaboration will ensure the effectiveness of interventions. Family and community engagement will play a pivotal role, fostering open communication and partnership opportunities to create a holistic approach to addressing academic challenges.

The following key structures will be place to ensure effective intervention programming:

- **Hiring:**
 - LEAD Southeast Elementary School will hire dedicated reading interventionists whose central responsibility is teaching reading intervention, assessing student progress, and analyzing data. At least one of the reading interventionists will hold a special education license and will serve students with disabilities with deficits in basic reading and fluency.
 - Each school will have an RTI Instructional Manager who owns coordination for the school in reading and math and coaches all interventionists in instruction and data analysis.
- **Scheduling:** Identified students will receive at least 45 minutes of intervention daily outside of their ELA and math blocks.
- **Universal Reading Screener:** NWEA MAP is LEAD's Universal Reading Screener (URS). NWEA MAP is administered to all students in grades Kindergarten - 5th. After MAP assessment, each school will determine students scoring in the bottom 25th percentile nationally on MAP composite. Students in the bottom 25% are administered additional skills-based measures as part of FastBridge as listed on URS Decision-Making Crosswalk (but not limited to them) and screening for characteristics of dyslexia. Dyslexia screening may be requested for any student (K-12) by the student's parent/guardian or school staff.

1. Administer Universal Reading Screening (URS) as outlined by TDOE:

- All students take URS
- Administer URS from Minimum URS Matrix according to grade level
- Administer URS three times per year Fall, Winter, Spring
- K-5th require all three administration

Universal Reading Screening	
<u>State Expectations</u>	<u>LEAD Elementary Schools</u>
All students take the URS	K-5th Assessed
Select URS from State's Minimum URS Matrix	NWEA MAP Reading
Frequency of Assessment: - K-5th require all three administrations	K-5th Fall, Winter, Spring

2. Administer Additional Survey-Level Assessments to students below 25% nationally on URS composite as outlined by TDOE:

- Survey-level assessments are based on risk indicators/flags on URS (including those listed on the URS Decision-Making Crosswalk but not limited to them).
- Other sources of data can be used.

Secondary Screening				
<u>State Expectations</u>	<u>Kindergarten</u>	<u>First</u>	<u>Second & Third</u>	<u>Fourth & Fifth</u>
Administer Additional Survey-Level Assessments to students below 25th percentile nationally on URS composite. Assessments vary based on URS Decision-Making Crosswalk : FastBridge .	Students below the 25th %ile on NWEA MAP Reading: - earlyReading Concepts of Print - earlyReading Letter Name - earlyReading onset Sounds - earlyReading Letter Sounds - earlyReading Word Segmenting - earlyReading Nonsense Words - TN-URS Rapid Automatized Naming (RAN) <i>*follow screening</i>	Students below the 25th %ile on NWEA MAP Reading: - earlyReading Word Segmenting - earlyReading Nonsense Word Fluency - earlyReading Sentence Reading - CBMreading - TN-URS Rapid Automatized Naming - TN-URS for Encoding <i>*follow screening windows found in URS Crosswalk: FastBridge</i>	Students below the 25th %ile on NWEA MAP Reading: - CBMreading (rate) - CBMreading (accuracy) - TN-URS for Encoding <i>*follow screening windows found in URS Crosswalk: FastBridge</i>	Students below the 25th %ile on NWEA MAP Reading: - CBMreading (rate) - CBMreading (accuracy) - TN-URS for Encoding <i>*follow screening windows found in URS Crosswalk: FastBridge</i>

	<i>windows found in URS Crosswalk: FastBridge</i>			

3. Diagnostic as outlined by TDOE:

- Examine student screening information to ascertain the appropriate placement within the Multi-Tiered System of Supports (MTSS) framework, as well as identify those in need of Individualized Learning Plan for Disabilities (ILP-D).

Data Analysis Expectations:

School-based data teams will meet to analyze data sources above to:

- Determine best-fit tier placement for each student including those who require a dyslexia-specific intervention.
- Determine which students qualify for an ILP-D based on state criteria AND which characteristic(s) of dyslexia should be the focus of their intervention class.

****Students may qualify for a dyslexia-specific interventions but NOT an ILP-D*

- **RTI Model:** Following the guidelines outlined in the Tennessee state RTI2 manual, LEAD Southeast will implement a universal screening process using the NWEA MAP as the Universal Reading Screener. This process is part of ongoing assessment, playing a crucial role in the RTI² framework and guiding data-driven decision-making. We have designed a universal screening process tailored to our students' needs, utilizing the national norms to make the decision. Upon data analysis, students will be grouped into MTSS (Multi-Tiered System of Supports) based on their screening results.

MTSS sessions will be scheduled for 45 minutes daily.

ELA MTSS Tiers:

- MTSS Tier 1, students who scored at or above the 26th percentile using nationally normalized scores on MAP assessments will participate. Their curriculum will include Amplify Writing Studio and the Boost online reading platform.
- MTSS Tier 2 will cater to students who scored between the 11th and 25th percentile on MAP assessments. Their intervention will involve mCLASS, which qualifies as a dyslexia-specific intervention.
- MTSS Tier 3 will address students who scored at or below the 10th percentile on MAP assessments, also utilizing mCLASS which qualifies as dyslexia-specific intervention.

Math MTSS Tiers:

- MTSS Tier 1- students who scored at or above the 26th percentile using nationally normalized scores on MAP assessments will participate. Their curriculum will include iReady Math and have access to select Do the Math lessons as needed.
- MTSS Tier 2- will cater to students who scored between the 11th and 25th percentile on MAP assessments. Their intervention will be the Marilyn Burns Do the Math curriculum.
- MTSS Tier 3- will address students who scored at or below the 10th percentile on MAP assessments. Their curriculum will include Bridges, which uses visual models and engaging games to quickly build foundational math skills.
- **Math Intervention Curriculum:** According to studies by Gersten, Newman-Gonchar, and Dimino (2017) and Vaughn, Roberts, and Klingner (2016), small-group instruction is an effective component of Tier 2 and Tier 3 math interventions. Working in small groups allows for targeted instruction, personalized feedback, and peer collaboration, which can enhance students' understanding and engagement. Both intervention curricula include these components and provide specific support for language acquisition and the development of mathematical concepts that will close the gap between their current performance and Tier 1 math expectations.
 - Students falling in Tier 1 for math will get their 60 mins of Eureka Math, then will get personalized instruction using iReady. Teachers can also use Do the Math intervention lessons for small groups during that time as needed. Research by Rupp et al. (2019) found that elementary students participating in adaptive skills-based math programs showed significant improvements in math achievement scores compared to students in traditional programs. The adaptive nature of the programs allowed for personalized learning experiences tailored to students' individual needs, leading to enhanced academic outcomes for students needing remediation and extension.
 - Students in need of Tier 2 math intervention in grades K-5 will utilize Marilyn Burns' Do the Math intervention. Research by Hiebert and Grouws (2007) emphasizes the importance of conceptual understanding as a foundation for procedural fluency in math. Interventions that prioritize conceptual learning help students make connections between mathematical concepts, leading to more robust learning outcomes. The design of the Do the Math program aligns well with the conceptual approach of Eureka Squared so that students are doing similar types of thinking and talking during their core instruction and intervention times. Our plan is to use frequent progress monitoring as students show mastery of targeted skills in Tier 2 interventions, promoting a steady and seamless transition through the tiers until they reach Tier 1 instruction.

- Students in need of Tier 3 math intervention in grades K-5 will utilize the Bridges math intervention. The Bridges curriculum is aligned with research-based practices that promote conceptual understanding and mathematical reasoning (NCSM & NCTM, 2018). It emphasizes the use of visual models, hands-on activities, and problem-solving tasks to engage students and deepen their understanding of math concepts. Our plan is to use frequent progress monitoring as students show mastery of targeted skills in Tier 3 interventions, promoting a steady and seamless transition through the tiers until they reach Tier 1 instruction.
- **Reading Intervention Curriculum:** mCLASS intervention program tailors instruction for Tier 2 and 3 interventions by first conducting a comprehensive assessment to identify reading areas where students are below grade-level expectations. Using a technology-driven grouping algorithm, mCLASS then organizes students strategically and provides precise instructional recommendations across different skill categories to meet specific grade- and time-related goals. Additionally, mCLASS serves as a Tier 2 and 3 dyslexia intervention, utilizing research-backed methods such as explicit, systematic, multi-sensory techniques that incorporate auditory, visual, tactile, and kinesthetic modalities, alongside small group intervention approaches. Its structured literacy lessons begin by addressing foundational skill gaps before advancing to more complex content. Furthermore, benchmarking and progress monitoring are employed to assess student progress and guide necessary adjustments to the intervention strategies.

Emphasizing foundational reading skills based around the Science of Reading encompassing crucial aspects like phonological awareness, decoding, fluency, and comprehension. For students needing decoding assistance, the mCLASS initially focuses on fundamental skills, providing aligned decoding instruction, while also offering concurrent support for students with both decoding and language comprehension needs, particularly benefiting English Language and diverse learners from the start.

Aligned with recommendations from the Institute of Education Sciences (IES) panel on Response to Intervention (RTI), mCLASS concentrates on three or fewer skills per instruction session to prevent overwhelming students. Each 45-minute intervention block targets a maximum of two skills, aiming to cultivate growth in the five reading skills highlighted by the National Reading Panel. mCLASS intervention lessons, accessed by teachers and featuring a systematic format, prioritize effective, direct instruction. Trained interventionists and teachers administer these lessons, engaging students through diverse lessons, while progress monitoring at the end of each 10-day instructional cycle allows for necessary adjustments to maintain intervention effectiveness.

- **Tier 2 and 3 Progress Monitoring:** LEAD Southeast will use FastBridge for Tier 2 and Tier 3 progress monitoring, utilizing its assessments, data collection, and reporting features. Through progress assessments, educators track student academic performance and growth, with FastBridge generating detailed reports for informed decision-making. This empowers educators to tailor instructional strategies and interventions, ensuring students receive necessary support.

Progress monitoring evaluates academic performance, rate of improvement, and instructional effectiveness. Measures align with each student's skill level, conducted every other week to maintain consistent tracking. Grade-level monitoring occurs monthly to gauge progress towards grade-level expectations. All data is reported using national percentiles, facilitating standardized assessment and comparison.

FastBridge data fosters transparent communication with students and families, enabling timely interventions. Educators respond rapidly to collected data, adjusting flexible grouping strategies based on real-time insights.

- **Fidelity Checks:** Observation and feedback will extend to intervention time.
- **Data Team Meetings:** Intervention teams will consistently convene to employ data-driven decision-making aligned with RTII policy and Say Dyslexia. The objectives include:
 1. Enhancing the efficacy of academic interventions for individual students and entire classes.
 2. Keeping parents informed about their student's progress in interventions.
 3. Identifying trends across students, teachers, curriculum, and the network to enhance the overall implementation of academic interventions.
 4. Tracking individual student growth over time, utilizing it as one of several data points to assess the need for an evaluation for exceptional education.

Additionally, these meetings play a crucial role in the creation and refinement of Individual Literacy Plans for Dyslexia (ILP-D), ensuring a targeted and personalized approach to support students with dyslexia.

- **Goal Tracking:** School leadership and network leadership teams monitor all student progress towards achievement measures, noting subgroup gaps and discussing responsive measures if they are not improving. Additionally, specific goals are set around intervention to ensure progress of students in that programming. For example, LEAD looks for 95% of students in reading intervention to increase their words correct per minute from fall to spring on the Fastbridge CBMR-English grade-level fluency screener.

- g. 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.

At LEAD, we know that the first step to our students' learning is ensuring that they are in school. LEAD has invested in ensuring high rates of student attendance through specific measures that will be used with LEAD Southeast Elementary School. LEAD Southeast Elementary will have a dedicated member of the operations team responsible for managing our attendance and chronic absenteeism (CA) process at the school level. This individual is responsible for implementing and tailoring the LEAD attendance plan to suit the unique needs of the school. While this individual leads the process, they will work collaboratively with an attendance team composed of our Family and Community Engagement liaison (FACE), principal, director of school operations, school counselors, and office manager. This team will meet biweekly to review current attendance data, monitor progress of students in attendance interventions, and proactively identify an action plan for students in specific attendance risk categories (e.g., 3-5 absences, 6-8 absences, etc.). In addition to the required

attendance and truancy processes, the attendance team is responsible for planning and implementing a comprehensive incentive plan, including daily, weekly, monthly, and quarterly incentives for various groups (e.g., high-risk students, students in targeted attendance categories, students with perfect attendance, students maintaining 95%+ attendance, etc.).

We understand that sometimes families face challenges that become barriers to student attendance. That is why we have developed the LEAD Serve Others Stations, which provides families access to household items and additional resources, as needed. These efforts are grounded in a shared interest in improving on chronic absenteeism, school and family relationships, and academic performance.

Student attendance and family outreach is tracked in DeansList, an online communications and data tracking portal. All student attendance and family communication, including every phone call and text message, will be housed in a single platform that allows our attendance team to quickly identify students who require the most support, track our outreach to the family, and course correct, if needed. This program has significantly streamlined and improved our family communication at our existing schools and has allowed us to work with our families to impress on them the importance of school attendance as the determinant factor in their students' success.

We understand that students must feel motivated to come to school and that begins with strong interpersonal connections. We will invest and engage all staff in the importance of student attendance and the measures each person can take to help it improve. We also track school culture indicators, such as student survey results such as "I feel connected to my school community – like I belong."

Finally, the specific attendance plan is based on tiers, where each student falls into one of three attendance tiers based on the percentage of school they attend. The attendance team employs a variety of tactics to identify and support students with good attendance and students who need to improve their attendance. Specific strategies fall in the areas of monitoring data, providing personalized early outreach, student and family engagement, and good and improved attendance recognition. How these strategies are implemented for each tier is outlined below:

- Monitor data
 - Tier 1
 - Bi-weekly meetings to identify students at risk of being chronically absent
 - Use attendance data to identify common barriers to attendance
 - Tier 2
 - Review attendance every week for students who are chronically absent
 - Collect qualitative data to assess the underlying cause of a student's continued absences
 - Evaluate whether students with persistent chronic absenteeism need an appropriate Tier 3 response
 - Tier 3

- Identify students who have a history of missing 20% or more of school and/or at risk due to other major challenges (involvement in child welfare, juvenile justice, homelessness, etc.)
- Review attendance daily and ensure that Tier 3 students are in school each day
- Follow up on each absence for each student identified for Tier 3 intervention
- Provide personalized early outreach
 - Tier 1
 - Follow action-steps protocol based on the number of absences
 - Include attendance on report cards and during Parent Teacher Conferences/Meetings
 - Integrate information about attendance in parent communication through registration, talking points, all calls, and social media
 - During orientation, educate families about school attendance expectations
 - Tier 2
 - Assign the student an attendance buddy (this could be an adult or student in the building that has a good relationship with the student)
 - Explore and arrange alternative transportation options for students (e.g., bus passes, gas cards, other families, etc.)
 - Facilitate family conference to address barriers to attendance
 - Create and maintain a student Attendance Improvement Plan
 - Tier 3
 - Use student Attendance Improvement Plan to help develop family strategies to support improved attendance and follow-up at agreed upon intervals
 - Ensure continued positive and regular contact with the family based on Attendance Improvement Plan
 - When the student misses school, ensure assigned personnel is following up on each absence
- Student and Family Engagement
 - Tier 1
 - Offer after school programming to engage students
 - Provide enrichment activities based on network guidelines (field trips, assemblies, dances, etc.)
 - Create a welcoming culture by greeting students/families at the door and front office
 - Create visuals that reflect attendance messaging (bulletin boards, banners, posters, classroom signs, etc.)
 - Facilitate family engagement (parent groups, programming, volunteering, etc.)
 - Tier 2
 - Follow action-steps protocol for calls, letters, and truancy petitions to families based on number of absences
 - Connect families to social services, community resources, and family engagement staff to address barriers

- Help students/families understand and avoid legal consequences of extreme chronic absenteeism
 - Support teachers in reaching out to chronically absent students/families and provide additional academic support to create a plan to complete work that was missed when student was absent
- Tier 3
 - Work with families to avoid legal consequences to the extent possible
 - Conduct family home visits to address barriers to attendance
 - Follow-up and determine if the courts have access to additional programs or services that would assist the family in overcoming barriers to attendance
- Recognize Good and Improved Attendance
 - Tier 1
 - Create friendly competition for good and improved attendance (free dress day, raffles, edible treats, public recognition, dances, etc.)
 - Celebrate individual progress through weekly, monthly, and periodic recognition (bulletin boards, certificates, verbal and written praise, etc.)
 - Recognize students/families at school-wide assembly
 - Tier 2
 - Work with students/families to set attendance goals and rewards
 - Engage students in tracking their own attendance daily
 - Recognize good and improved attendance based on the student Attendance Improvement Plan
 - Tier 3
 - Incorporate appropriate positive reinforcements into Attendance Improvement Plan for recognizing improved attendance

While we lead with encouraging families to make attendance a priority, we also follow the process of ensuring truancy compliance. Our process is as follows:

- One (1) to four (4) day(s) unexcused absences: The CA manager completes daily calls to the families of all absent students noting the number of absences as well as offering support and next steps to avoid missing more school.
- Five (5) days unexcused absences: We provide written notice, via a letter sent by email and mail, to the parent/guardian noting the number of absences and also provide information on Tennessee's Compulsory Attendance Law. At this point, our school counselor makes contact with the student and parent/guardian and includes our Family And Community Engagement (FACE) liaison to ensure additional wrap-around services are not needed for the family.
- Seven (7) days excused or unexcused absences: The CA manager provides written notice, via a letter sent by email and mail, to the parent/guardian requesting a meeting to create a formal plan to ensure we can limit the number of future days out of school.

- Ten (10) days excused or unexcused absences: The CA manager makes contact with the parent for each additional day out of school to ensure the parent knows how each additional day missing school will have a negative impact on the student's academic success.

h. Explain how students will matriculate through the proposed school (i.e., promotion/retention policies).

Research shows that students who are retained are more likely to drop out of high school¹⁵. Thus, LEAD, while following state and local matriculating guidelines, works diligently to ensure students are successfully promoted each year by getting the individualized support they need when they need it. LEAD Southeast Elementary School will operate in the same manner.

The Tennessee State Board of Education Promotion and Retention Policy (2019) requires that promotion is "... based on the successful completion of required academic work or demonstration of satisfactory progress in each of the relevant academic areas." Through LEAD's RTII and at-risk identification process, along with its dedication to data-driven instruction, students who are at risk of not demonstrating satisfactory progress are identified early in the year. In alignment with our mission "Ready for College, Ready for Life," our school is dedicated to ensuring that every student achieves academic proficiency and is prepared for success in higher education and beyond.

<u>Step</u>	<u>Process</u>
Development of IGGs	- Our school will develop Individual Growth Goals (IGGs) for each elementary student in the areas of reading, math, and social-emotional learning (SEL). - IGGs will be personalized based on each student's current needs, and grade-level standards. - Students with Individualized Education Plans (IEPs) or designation as Multilingual Learners (ML) will have IGGs tailored to their specific needs and factors impacting their performance
Communicating Goals and Promotion Criteria	- IGG goals will be reviewed with students and their families to ensure understanding and collaboration toward achieving these goals. - Progress towards IGG goals in reading, math, and SEL will be monitored regularly and communicated with families at conferences and conversations throughout the year. - In the middle of the year, conferences will be held for students who are not meeting one or more of the promotion criteria outlined in their IGGs.

¹⁵ Mariano, Martorell, & Tsai, 2018

Tiered Interventions	- At mid-year -or- following any two consecutive quarters where a student is not meeting promotion criteria the school will: - coordinate a support team meeting with families to determine and assign the appropriate tiered intervention - Some examples are our math/reading interventions our Tier 2/3 SEL interventions and potential referrals to after-school or community-based supports
Additional Supports	At the end of the year we will determine which students will: - Pass to the next grade level - Attend summer school and pass to the next grade - Attend summer school and pass to the next grade and direct assignment to tiered interventions for the start of the next year

IGG Categories (Math, Reading, SEL)	Middle-of-Year Promotion Review	End-of-Year Promotion Review
Meeting all 3 goals	The student is on track for promotion.	The student passes to the next grade level.
Meeting 2 of 3 goals	The student is assigned to the appropriate Tiered interventions: ● Tier 2 or 3 for math ● Tier 2 or 3 for reading ● Tier 2 or 3 for SEL	The student attends summer school and passes to the next grade level.
Meeting 0-1 goals	Family Conferences are held to determine appropriate supports and next steps. The student is assigned to the appropriate Tiered interventions: ● Tier 2 or 3 for math ● Tier 2 or 3 for reading ● Tier 2 or 3 for SEL	The student attends summer school and passes to the next grade level. The student starts the following school year in Tier 3. In accordance

This promotion review process is designed to ensure that every student receives personalized support, interventions, and resources to achieve academic success and reach grade-level proficiency in reading, math, and SEL. By setting individualized goals, implementing tiered interventions, and fostering collaboration

between home and school, we are committed to fulfilling our mission and preparing our students for success in middle school and beyond.

LEAD Public Schools will adhere to T.C.A. § 49-6-3115 requiring 3rd grade students, with some exceptions for English Learners and students with IEPs or being evaluated for specific disabilities, determined NOT to be proficient in English language arts (ELA), may not be promoted to the next grade level, without certain conditions being met. LEAD believes that the best approach to ensuring all 3rd grade students are promoted to 4th grade is to make certain that they are well-equipped with the foundational reading and writing skills to demonstrate proficiency on the 3rd grade ELA TNReady assessment. Through frequent formative and summative assessments aligned to grade-level standards, teachers will determine individual student needs and will intervene with the necessary urgency. Should a student score below “approaching” on the TNReady ELA assessment, LEAD will require that, in order to be promoted:

- The student is retested before the beginning of the next school year and scores proficient in ELA; or
- The student will attend a learning loss bridge camp before the beginning of the upcoming school year, maintaining a ninety percent (90%) attendance rate at the camp, and the student's performance on the post-test administered to the student at the end of the learning loss bridge camp demonstrates adequate growth, as determined by the department; or
- The student is assigned a tutor through the Tennessee Accelerating Literacy and Learning Corps (TN ALL Corps) to provide the student with tutoring services for the entirety of the upcoming school year based on tutoring requirements established by the department.

Should a student score “below” on that the TNReady ELA assessment, LEAD will require that, in order to be promoted:

- The student is retested before the beginning of the next school year and scores proficient in ELA; or
- The student attends a learning loss bridge camp before the beginning of the upcoming school year and maintains a ninety percent (90%) attendance rate at the camp and is assigned a tutor through the TN ALL Corps to provide the student with tutoring services for the entirety of the upcoming school year based on tutoring requirements established by the department.

At LEAD Southeast Elementary School there will be a particular focus on reading ability. Before 4th grade, students’ reading abilities are carefully monitored so additional interventions can be applied to any student not on track to master foundational reading skills. As with all things at LEAD, changes to instructional practices, programs, and structures are made as needs dictate.

- i. 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.

According to Tennessee’s Response to Instruction and Intervention Framework (2020), a Tennessee Ready student is one who graduates “... with the knowledge, abilities, and habits to enter and complete postsecondary education without remediation and to seamlessly move into a career that affords them the opportunity to live, work, and sustain.” LEAD believes the work to meet this goal begins with early education.

All students at LEAD Southeast Elementary School will demonstrate readiness in the area of academic and technical knowledge and skills through their mastery of grade-level standards.

Students at each grade level at LEAD Southeast Elementary will demonstrate age-appropriate behaviors that show progress towards these exit standards. For example, in fourth and fifth grade, students demonstrate school pride and community involvement and an understanding of how choices affect themselves and others. These skills are taught and measured in Crew at all grade levels, as well as embedded in daily lessons, activities, and events, such as student-led conferences.

Question k is REQUIRED for sponsors proposing an elementary school

k. If an elementary school, how will the school approach ensuring 3rd graders receive proper tutoring, remediation, support, and summer school in alignment with Tenn. Code Ann. § 49- 6-3115.

In alignment with Tenn. Code Ann. § 49-6-3115, LEAD Southeast Elementary will recognize the critical importance of ensuring 3rd graders receive proper tutoring, remediation, support, and access to summer school. The school will implement a proactive approach to address the needs of 3rd graders, focusing on the following key components:

- **Early Identification:** LEAD Southeast Elementary will initiate an early identification process to identify 3rd graders who may require additional support in reading proficiency. This involves the use of assessments, including TNReady, NWEA MAP, and other relevant tools, to pinpoint students who may be at risk of falling behind.
- **Targeted Tutoring and Remediation:** Students identified as needing additional support will be provided with targeted tutoring and remediation. This involves implementing evidence-based interventions tailored to individual student needs, focusing on foundational reading skills and addressing specific areas of difficulty.
- **Individualized Student Support Plans:** For 3rd graders requiring extra assistance, LEAD Southeast Elementary will develop individualized support plans. These plans will outline specific strategies, interventions, and resources to address each student's unique learning needs, ensuring a personalized approach to remediation.
- **Collaborative Decision-Making:** Collaborative decision-making involving the network academic team, school leadership team, and heads of schools ensures a comprehensive understanding of 3rd graders' needs. This collaborative effort informs the selection and implementation of effective strategies for tutoring and remediation.
- **Summer School Programs:** LEAD Southeast Elementary will design and offer summer school programs specifically targeting 3rd graders who may benefit from additional instruction and support. These

programs are structured to address reading proficiency and prevent learning loss during the summer break.

- **Data-Driven Monitoring:** Continuous monitoring of student progress is embedded into the approach, utilizing data from formative assessments, NWEA MAP, and other relevant sources. Regular reviews of student outcomes will inform ongoing adjustments to tutoring, remediation, and support strategies.
- **Family Engagement:** The school will actively engage families in the process, ensuring open communication about the importance of tutoring, remediation, and summer school opportunities. Collaborative partnerships with families contribute to a supportive environment for 3rd graders to thrive academically.
- **Professional Development:** Teachers and support staff involved in tutoring and remediation will receive ongoing professional development to enhance their capacity to address the specific needs of 3rd graders. This includes training in evidence-based practices for reading instruction and targeted interventions.

LEAD Southeast Elementary's approach to ensuring 3rd graders receive proper tutoring, remediation, support, and summer school aligns with Tennessee regulations. The school's commitment to early identification, individualized plans, collaboration, and family engagement underscores our dedication to fostering reading proficiency and academic success for 3rd graders.

Section 1.5 – Assessments

Public 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:

- a. Identify the primary internal assessments the proposed school will use to assess individual student and sub-group learning needs and progress throughout the year.
- b. Explain how these internal assessments align with the school's curriculum, performance goals, and state standards.

At LEAD Public Schools we believe the purpose of assessment is to gain insight into student understanding. Effective assessment should make student thinking visible and require teacher and student response and action. LEAD depends on an extensive and carefully intentional assessment system to determine individual student needs, identify trends in whole group and subgroup learning needs, and measure progress towards goals, standards, and curriculum outcomes throughout the year. We believe that an assessment should only be administered if the data will be useful in improving instruction for students. Therefore, every assessment we administer has a data analysis and action component.



The internal assessments at LEAD Southeast Elementary will be crafted to align seamlessly with the school's curriculum, performance goals, and state standards. This begins with our selection of a curriculum that is approved by the Tennessee Department of Education, based on its existing alignment to state standards. From that curriculum, we intentionally develop scope and sequences in all core content areas that provide guidance for when we teach each standard and the corresponding time and method for assessing mastery towards the standards. Teachers are trained on scope and sequences during LEAD University.

Assessments, both summative and formative, are given throughout the year and leveraged immediately by staff to enhance academic outcomes for students and improve instructional practices. The design of our assessments allows us to gauge student mastery throughout the year towards specific standards. Emphasizing skill-specific alignment, the assessments focus on key competencies outlined in the curriculum. Unit assessments are developed in alignment with our curriculum and integrate into our scope and sequence. As with other LEAD schools, LEAD Southeast Elementary will utilize Mastery Connect for network interim assessments, including implementing MasteryView Predictive Assessments (MVPAs). These assessments include item banks for core content areas that are aligned to state standards and therefore allow us to gauge students' progress towards proficiency on TNReady assessments. Student performance on our network IAs has

been shown to be strongly predictive of TNReady performance. In addition, the format of our network interim assessments mirrors the administration of TNReady to build students' necessary test-taking skills. Recognizing diverse learners, the assessments are differentiated to accommodate varying needs, ensuring a fair representation of progress for all students. Part of a continuous improvement cycle, the assessments contribute to data-driven decision-making, curriculum refinement, and dynamic goal-setting.

Below is an overview of the major internal assessments given at LEAD as well as how data from assessments are utilized to inform school-level decisions:

- **Unit Assessments:** In K-2, students will take 3-4 unit assessments a year. These assessments are embedded into the adopted curriculum and include writing tasks that are designed to measure mastery of units, foundational reading assessments, and pre- and post- assessments and mid-unit check points in math. In grades 3-5, students will also take unit assessments embedded into the adopted curriculums, in addition to interim assessments. Interim assessments align to the content that has been taught up to that point in the year as well as to the Tennessee state standards.
- **Network Interim Assessments:** Network Interim Assessments (NIAs) will be administered to students once per quarter in grades 3-5 as an opportunity to see how students demonstrate knowledge and skills on high-leverage standards in ELA, math, and science. LEAD administers MasteryView Predictive Assessments, interim assessments developed by Mastery Connect in collaboration with network core content directors. These interim assessments closely follow TNReady blueprints and are tightly aligned to Tennessee state standards. Highly predictive of student proficiency on TNReady assessments, interim assessments are given at the same time across the LEAD network. At LEAD, NIA data is analyzed within two weeks of administering the assessment. Instructional managers work individually with teachers to determine student misconceptions and plan reteaching opportunities. Also, NIA data is paired with MAP data to predict whether students are on track towards proficiency on TNReady. This information supports small group instruction and changes in remediation groups.
- **Measure of Academic Progress (MAP) reading and math tests:** Students will take the NWEA MAP assessment three times a year beginning in kindergarten. The data from this assessment reveals how students perform in comparison to their grade-level peers across the country, specific skills with which they struggle and excel, and how students grow from test to test. LEAD utilizes data from MAP assessments to ensure heterogeneous groupings of students within classes. Throughout the year MAP data is used to inform small group instruction within classes and to place students in tiers for reading and math intervention. Teachers, alongside their instructional managers, analyze gaps that students demonstrate along the learning continuum from NWEA and target those gaps through small group instruction. The learning continuum shows specific areas of need by student and subject area. This information forms the basis of small group plans and expectations for scaffolding instruction. MAP scores serve as a universal screening tool to determine intervention placement. Network support also correlates MAP scores to projected TNReady scores to help schools assess progress towards those annual goals. Finally, beginning in Grade 3, students will receive Individual Growth Goals at 1.5 years of growth over the course of a year until students hit grade level. This internal metric helps teachers and administrators ensure all students who are behind are growing at a rapid rate.

- **Multi-Tiered Systems of Support (MTSS) Model:** At the heart of our approach is the implementation of a robust Multi-Tiered Systems of Support (MTSS) model. This model, guided by a dedicated network director of MTSS, encompasses expanded intervention in reading and mathematics, as well as a comprehensive behavioral support system led by a director of student support. The school-level oversight by instructional managers and assistant principals of instruction ensures a seamless integration of academic and emotional support, addressing the diverse needs of our students. Within this framework, the universal screening process utilizing the NWEA MAP as the Universal Reading Screener plays a crucial role, serving as the initial step in identifying students who may benefit from additional support. Through this systematic approach, we aim to provide personalized interventions that enable every student to thrive academically and emotionally.

In MTSS Tier 1, students scoring at or above the 26th percentile on MAP assessments, benchmarked against national norms, will be included. Their curriculum will incorporate Amplify Writing Studio and the Boost online reading platform. Additionally, they will engage with I-ready math, providing further support and reinforcement in mathematical concepts.

MTSS Tier 2 is designated for students scoring between the 11th and 25th percentile on MAP assessments. Their intervention will utilize mCLASS, recognized as a dyslexia-specific intervention. Students in need of Tier 2 math intervention in grades K-5 will utilize Marilyn Burns' Do the Math intervention, focusing on operational fluency for all four operations.

MTSS Tier 3 is tailored for students scoring at or below the 10th percentile on MAP assessments. Similar to Tier 2, their intervention will involve the use of mCLASS as a dyslexia-specific intervention. We will use Bridges for our Tier 3 math intervention. It is Structured as more intensive, shorter units of targeted instruction focused on a specific skill.

ELA & Math MTSS Tier Cut Scores	
<u>Tier</u>	<u>Universal Reading Screener MAP</u>
1	26th+ percentile
2	11-25th percentile
3	<10th percentile

ELA MTSS Tiers			
<u>Tier</u>	<u>Grade</u>	<u>Time</u>	<u>Tool</u>
1	K-2	45 minutes/daily	Writing Studio Boost Reading

1	3+	45 minutes/daily	Writing Studio Boost Reading
2	K-2	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
2	3+	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
3	K-2	45 minutes/daily	mCLASS <i>*dyslexia specific</i>
3	3+	45 minutes/daily	mCLASS <i>*dyslexia specific</i>

Math MTSS Tiers			
<u>Tier</u>	<u>Grade</u>	<u>Time</u>	<u>Tool</u>
1	K-5	45 mins	iReady Math
2	K-5	45 mins	Do the Math
3	K-5	45 mins	Bridges

- **Fastbridge:** FastBridge assessments will play a pivotal role in helping educators enhance student learning, academically, through a comprehensive and data-driven approach to education. For kindergarten, the focus will be on utilizing Early Reading measures that constitute the full composite as normed by FAST. These measures cover screening in areas such as phonological awareness, phonemic awareness, alphabet knowledge, sound/symbol recognition, and decoding skills. This targeted approach aims to address specific foundational skills crucial for early literacy development. Beginning in Grade 1, Fastbridge uses Curriculum Based Measures (CBMs) to quickly assess student performance on foundational reading and math skills. During the screening windows, which occur during the early fall, winter, and spring, students are assessed on specific skills on grade level or at the highest level available, to measure growth over time compared to same-age peers and the overall effectiveness and impact of intervention. Beginning in kindergarten, grade-level Fastbridge screening is also used as a secondary screener to place students in appropriate interventions. Fastbridge is also used for progress monitoring. Students in math and reading interventions are assessed on their instructional level to measure growth over time and ensure the intervention is working effectively for each student. Typically, these assessments occur every two weeks, with an analysis of student growth at least once every quarter. Students can be measured on a variety of skills and assessments in Basic Reading, Reading Fluency, Reading Comprehension, Math Calculation, and Math Problem Solving. Secondary screening and diagnostic data are used to place students into the appropriate assessment(s), aligning with the intervention and skill gaps for each student. Leveraging the progress monitoring data from FastBridge is also pivotal in assessing the necessity for ILP-D development. This data-driven approach is

essential for gauging intervention needs, particularly in the context of Tennessee's dyslexia policy. Starting from the elementary years, the insights gained from FastBridge contribute significantly to shaping Individual Literacy Plans for Dyslexia, ensuring early and effective support for students to increase their future success in middle and high school.

- **Exit Ticket Data:** LEAD teachers regularly use exit ticket data to evaluate student learning between classroom summative assessments. These formative data pieces provide teachers with information as to which students were successful with the day's learning outcomes. Teachers use exit tickets daily to ensure that students master content objectives. This exit ticket data is shared with students the following day and teachers are able to highlight and correct misconceptions based on this data. The process of using exit ticket data as a formative assessment ensures that student misconceptions are addressed before the classroom summative assessment.
- **Formative Language Assessments (FLAs):** LEAD utilizes a systematic process of language analysis that provides students and teachers with feedback on students' progress toward specific instructional goals for using English. FLAs are given prior to each Individual Learning Plan (ILP) Update. ILPs are updated every quarter per State Rule 0520-01-19. Teachers utilize FLA data to determine a student's progress towards their WIDA ACCESS growth goals. FLAs are reviewed at both the network and the school level to shape professional learning for EL teachers and to inform necessary instructional changes.
- **Grades:** In addition to network and state-normed assessments, all students take in-class assessments aligned to the curriculum and Tennessee Academic Standards. Assessment data helps inform more consistent instructional decisions and informs the students' grades. In addition, it allows teachers and members of the leadership team to communicate with families of struggling students. If a student is failing, families are notified weekly. If a student fails two or more classes for the quarter, a meeting is held to discuss performance and determine support moving forward. In elementary, students in grades 3-5 take 3-4 unit assessments, depending on the content and embedded into the adopted curriculum. Students in grades K-2 take unit assessments embedded in the curriculum, including three benchmark assessments in foundational reading skills, 3-5 assessments on key foundational reading skills (letter name and sound recognition, spelling, decoding, phonological awareness, fluency), writing tasks designed to show mastery of each unit, and pre- and post- assessments and mid-unit checkpoints for each Bridges unit.

- c. Identify the person(s), position(s), and/or entities that will be responsible for and involved in the building testing coordination.

The network academic team manages and coordinates administration of all common assessments in the network. The network director of evaluation and assessment attends state and district assessment meetings and uses that information to construct assessment plans. From there, they collaborate with the school's assistant principal of instruction (API), building testing coordinator (BTC), and instructional managers to develop and implement school specific plans.

Our assistant principals of instruction, directors of school operations, and network data team will manage the building testing coordination:

- **Assistant Principal of Instruction:** Spearhead the student and teacher investment plan, set transparent testing expectations, and establish a well-defined testing schedule.
- **Director of School Operations:** Take charge of securely storing test booklets and ensure accurate labeling to facilitate a smooth and organized testing session.
- **Network Data Team:** Oversee testing security and compliance to uphold the integrity of the testing process across the school network.

- d. Explain how the proposed school will collect and analyze student academic data and use it to inform instruction, professional development and teacher evaluations.

At LEAD Public Schools, all staff believe the purpose of assessment is to gain insight into student understanding. Effective assessment should make student thinking visible and require teacher and student response and action. LEAD Public Schools defines assessment in three ways: *of*, *as*, and *for* learning.

A key to quality assessment is that students are users of their own assessment data. Therefore, LEAD Southeast Elementary will ensure even our youngest students understand the purpose of every assessment they take. Students regularly celebrate their learning and reflect on their growth and progress in a safe and supportive environment. In addition to helping teachers know where students are, data is seen as an opportunity for all children to build their growth mindset, sense of themselves as independent learners, and sense of collective responsibility for a productive classroom, characteristics that will foster strong academic habits for years to come. Beginning in grade 3, this celebration and growth monitoring will become more formal through the use of Individual Growth Goals, which are set for each major assessment throughout the year so students can measure their growth and progress and have a clear goal to work toward.

Another aspect of quality assessment is analysis and use of data to improve instruction. LEAD believes that an assessment should only be administered if the data will be useful in improving instruction for students. Therefore, every assessment administered has a data analysis and action component. Data analysis and action looks different depending on the assessment, but it is conducted for each student at the teacher/coach level, school level, and network level as a minimum. It includes looking at individual students' needs and whole group trends through the lens of student growth and grade level mastery. Staff identify actions that led to the scores, both good and bad. Teachers identify high-leverage gaps and misconceptions behind those gaps to address in reteaches and spirals. Adjustments to lessons and units are made depending on student needs, and professional development is driven by trends in student data across a content area, grade level, or both. Effective data practices are woven through the TEAM rubric, which is how teachers are evaluated at LEAD.

The network data and academic teams also collaborate to conduct high-level, network analysis for each assessment using Looker Studio. This program enables the team to conduct analysis of more than one assessment, to look for correlations and trends across the network. These analyses are shared with network leaders for decision making and goal tracking and with school leaders for comparison and goal tracking. The network academic team also coordinates and trains school leadership teams on methods of analysis and protocols for decision making.

While student data is collected and analyzed in real time throughout the school year, TNReady scores provide us with valuable information for planning for the following year. Network teams and school leaders work together to identify trends at the network, school, grade, and teacher levels to capitalize upon strengths and to create plans to address areas of need. At LEAD Southeast Elementary, analysis of TNReady data will allow us to identify teachers shepherding students towards strong academic outcomes and to highlight and celebrate the best practices utilized in their classrooms. TNReady scores will also shine a light on gaps in implementation of our curricula and programming. Additionally, our participation in network-level analysis is a key component of our collaboration with LEAD Southeast Middle as we work to ensure that students who exit LEAD Southeast Elementary in 5th grade are well prepared for a challenging middle school curriculum.

Below we outline our school-level data analysis cycle in more detail.

Screeners and Progress Monitoring. We use MAP as our universal screening tool for reading and math. This is administered at the beginning, in the middle, and at the end of each year to monitor student progress. MAP results are initially used to create student roster groupings and identify students for further screening and interventions; we then monitor progress toward our goals of 1.5+ years of growth via the mid and end of year test administration. FastBridge (reading and math) and PWRS (reading) are administered to students who fall below the 25th percentile to determine level of need for additional interventions. Students in reading and math interventions have progress monitoring via FastBridge weekly for Tier 3 and biweekly for Tier 2. Progress monitoring data is reviewed monthly with instructional leaders and interventionists to determine student progress and adjust instruction accordingly. Instructional leaders conduct formal fidelity checks twice per quarter in intervention classes and coach interventionists to a minimum of 80% fidelity to the intervention curriculum. Each quarter intervention teams complete data analysis to adjust instruction and to adjust student groupings based on progress.

Instructional Data. Teachers and leaders use the LEAD Public Schools interim assessments through MasteryConnect as a foundation for our instructional data collection and analysis protocols, administered three times per year. This allows us to measure progress toward proficiency for all students and for our subgroups and make quarter-long adjustments to instructional priorities.

Throughout each quarter, teachers and instructional leaders use mid and end of unit assessment data to make adjustments within the unit and to provide additional reinforcement or reteaches during data response days in the pacing calendar, Do Nows, and/or spiral reviews. Instructional managers also use this data with teachers as they complete unit preparation for each new unit to determine and plan for any areas of emphasis for review skills or concepts.

Each week, our teachers and co-teachers complete stack audits of student work and/or exit tickets, during which they look at the qualities of the work in comparison to an exemplar and make decisions about how to adjust the next day's lesson. Instructional leaders model, coach, and support teachers in the process to build content knowledge and teachers' capacity to see and respond to instructional data in ways that move students forward each day.

Instructional data analysis goes hand in hand with instructional planning. Our teachers and co-teachers plan weekly with support from school and/or network staff, including planning for students with diverse learning needs. During planning meetings, instructional leaders build content and pedagogy knowledge. This planning process is informed by the instructional data collected through stack audits, quizzes, and unit assessments.

Intervention staff utilize data from student screeners, which are administered at the beginning, middle, and end of the year to make adjustments to student intervention placements. Progress monitoring data is reviewed during monthly meetings and/or coaching sessions, with clear benchmarks for growth that are used to determine any potential movement of students between intervention groupings. Weekly (Tier 3) and bi-weekly (Tier 2) progress monitoring data, along with observation data and/or fidelity check data, are used to make instructional adjustments to lessons and teaching strategies.

All of this data and planning are then used by our instructional leaders to adjust their schedules and focus areas for teacher coaching and support. Instructional leaders observe, live coach, and assist students based on the teacher's action steps, teaching data, and student performance data.

Culture Data. LEAD Public Schools uses DeansList as a primary tool for recording and analyzing student culture data. This data is analyzed by our culture leaders, student support team, and instructional leaders on a regular basis. Data analysis includes staff-focused data (positivity ratio, referrals by teacher, grade-level trends, communication data) and student-focused data (positivity ratio, referrals by student, grade-level trends).

Instructional leaders review data with their teachers to ensure that positivity ratios are high and that any issues reflected in referral data are addressed (e.g., specific classes that would benefit from push-in support, students who need a restorative conversation/call home, etc.). Our culture leader and student support team members review data for high-frequency locations, times, staff, and students on a biweekly basis. Each round, they make adjustments to their schedules and support priorities to address areas of need.

At the middle of each quarter, we run the LEAD Public Schools Student Needs Analysis Protocol (SNAP). The SNAP process analyzes student risk levels for attendance, behavior, and grades according to common network-established criteria. Each round begins with our SNAP leadership team (school leaders, school counselors, family engagement coordinator, and network MTSS staff) unpacking the school data to identify bright spots and trends in the data, as well as the school actions that contributed to the bright spots and trends. The SNAP leadership team then identifies key Tier 1 actions that the school will take for the next nine-week cycle (e.g., adding new attendance incentives or refining the gradebook check process with instructional leaders). School-level data highlights and trends, individual student celebrations, and Tier 1 school actions are shared with the full staff.

The SNAP leadership team also assumes responsibility for creating and implementing intervention plans for the students at the highest levels of risk for a) all categories and b) behavior. After this, grade-level teams meet to complete the iSNAP (individual SNAP) process. In this process, teams of teachers and support staff identify students with high risk in all categories or at the highest level of behavior risk, then develop interventions and assign implementers. The student support team takes students with Tier 3 behavior needs and provides customized, higher intensity interventions and incentives to promote appropriate behavior.

LEAD's MTSS team provides resources for identifying hypothesized student needs and interventions to meet those needs. All information regarding interventions is recorded in the SNAP Tracker and is revisited in the middle of each quarter. Intervention owners, especially those on the school leadership team, use customized DeansList reports for their personalized intervention group rosters to monitor progress, engage in reflections with students in their intervention groups, and celebrate success and progress with students.

During biweekly grade-level team meetings, each grade level's iSNAP facilitator leads an agenda that includes time for sharing bright spots about student growth, strategies to more effectively serve students including diverse learners, and other grade-level specific items related to the culture and academics within the grade. One of our school leaders and members of the student support team (student support coordinators and/or counselors) sits on each grade-level team to provide connections to each team in the building.

Student Data. At LEAD, we are committed to engaging with students in their own data. Teachers share data and celebrate progress with students during reading intervention classes/progress monitoring, after class assessments, and even after turning around stack audits to highlight the qualities of student work and growth that they are making in their grade-level skills.

All school staff and students are engaged in Individual Growth Goal (IGG) data conferences, which occur approximately every month through the Crew sessions. School staff team up to work with specific Crew groups. Prior to IGG conferences, staff pull data from the LEAD Student Data Dashboard including attendance, behavior, grades, and at specific times of the year, assessment data (MAP, IAs, etc.). This data is then shared with students using a data reflection template during the IGG Crew Conferences. Students reflect on their data and identify key areas of strength and one area for growth. They then work with the adult to set a goal for the next IGG conference (e.g., miss no more than 1 day of school; improve positivity ratio to 3:1; improve grade in a class to X%). Students then name ways that school staff can support them in reaching their goal by the next month and set a schedule for checking in on progress toward the goal. This data is recorded on the IGG conference logs and revisited each month to celebrate success and set new goals.

We also conduct a LEAD Public Schools student survey in the fall and spring to assess, analyze, and create action plans about student experiences and perceptions of the school. This data is shared with the school team after each administration, and our leadership teams use it to guide strategic actions in the building.

Leader Data. LEAD Southeast Elementary's leadership teams will use a set of recurring data cycles to guide our work in achieving the annual school goals for academics and culture. All data cycles are guided by the school scorecard, a comprehensive set of data metrics for all LEAD schools including academics (e.g., TNReady, MAP, unit assessments, Formative Language Assessments, RTI progress monitoring and screening data, teacher observation data, teacher action step progress, strong start/instructional strategy implementation data, etc.), culture (e.g., suspension rate, referrals by teacher/student, positivity ratio, student survey data, staff survey data, etc.), and operations (e.g., daily attendance rates, chronic absenteeism rates, chronically absent students, students at risk for attendance, enrollment, family engagement, etc.).

- e. Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve instruction.

Student outcomes and data analysis is at the heart of what we do. The network academic team coordinates and trains school leadership teams on methods of analysis and protocols for decision making, while leadership teams do the same for teachers. There are regular meetings throughout the year between network data support and school leadership teams to ensure ongoing and effective analysis. School leadership teams also have goals dashboards which are referenced with staff and visited periodically to measure the whole-school process. School leadership and teachers engage in a weekly see it/name it/do it process to identify gaps and misconceptions that need to be addressed in class. Coaches are trained on this during coaching institutes and they execute with the teachers they coach. Larger reteach plans and whole group analysis are conducted for major assessments like MAP. Data Days are used to build collaboration across the network. LEAD also looks at how assessments and Individual Growth Goals on those assessments are understood and leveraged by students in an attempt to use them to build their self-efficacy.

Question f is REQUIRED for sponsors proposing an elementary school

- f. Identify what will the school use as a universal reading screener in alignment with foundational literacy requirements?

LEAD Southeast Elementary will be dedicated to implementing a holistic approach to foundational literacy, and as part of this commitment, the school will utilize NWEA MAP as the universal reading screener in alignment with foundational literacy requirements. NWEA MAP, recognized for its efficacy in assessing crucial literacy components such as phonemic awareness, phonics, fluency, vocabulary, and comprehension, will serve as a comprehensive tool to evaluate students' literacy skills. The choice of NWEA MAP aligns with evidence-based practices and undergoes a thorough evaluation process to ensure its seamless integration with the school's curriculum, adherence to state standards, and alignment with overall literacy objectives. By incorporating NWEA MAP as the universal reading screener, LEAD Southeast Elementary aims to precisely pinpoint students' literacy needs, tailor instruction effectively, and cultivate a robust foundation in reading for all students.

Section 1.6 - School Calendar and Schedule

In this section:

- a. Provide the annual academic calendar for the proposed school as [Attachment B](#).
- b. Provide the proposed school's detailed daily schedule by grade as [Attachment C](#).
 - Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies.
- c. 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.

LEAD Public Schools designs its network calendar to meet the following criteria: provide ample instructional time during the school year; maximize school-based and cross-network teacher collaboration and professional development (PD); and, where appropriate, mirror the local school district, in order to support parents and families with students attending LEAD and local public schools.

The schedule tables provided below are based on the mandatory time frames outlined by the state of Tennessee. They do not constitute a finalized master schedule but rather serve as a preliminary structure to ensure alignment with state regulations. Adjustments and refinements will be made as necessary to create a comprehensive master schedule that meets the needs of all stakeholders.

LEAD Southeast Elementary Daily Schedule K-1st	
Subject	Minutes
Morning Meeting (SEL)	15 minutes
Related Arts	60 minutes
ELA	150 minutes
Lunch	30 minutes
Science/Social Studies	30 minutes
Math	60 minutes
Recess	20 minutes
MTSS	45 minutes
Closing Circle (SEL)	10 minutes

LEAD Southeast Daily Schedule 2nd	
Subject	Minutes
Morning Meeting (SEL)	10 minutes
Related Arts	60 minutes
ELA	150 minutes
Lunch	30 minutes
Science/Social Studies	30 minutes
Math	75 minutes
Recess	20 minutes
MTSS	45 minutes

LEAD Southeast Elementary Daily Schedule 3rd-5th	
Subject	Minutes
Morning Meeting (SEL)	10 minutes
Related Arts	60 minutes
ELA	135 minutes
Lunch	30 minutes
Science/Social Studies	30 minutes
Math	90 minutes
Recess	20 minutes
MTSS	45 minutes

Professional development days incorporated in the calendar provide opportunities for teachers to come together to receive training relevant to increasing student outcomes in their content areas. LEAD also prioritizes LEAD University, its summer professional development that onboards new employees and rallies all staff around our network mission. This professional development typically lasts five weeks and is composed of training and workshops from all members of our staff.

LEAD Southeast Elementary will offer summer programs to prevent learning loss during the break and provide additional academic support. These programs will include targeted interventions, enrichment courses, and extracurricular activities to engage students in a positive and constructive manner during the summer months.

LEAD Southeast Elementary will integrate community engagement events into the school calendar. These events will include family nights, community workshops, and collaborative projects that involve parents, caregivers, and local organizations. Engaging the community in the school calendar fosters a sense of belonging and strengthens the partnership between the school and its stakeholders.

By embracing these principles, LEAD Southeast Elementary School will aim to create a school year and calendar that not only meets academic requirements but also provides a supportive and enriching environment for students, teachers, and the broader community. This approach aligns with the school's mission of preparing students for success in college and life through a comprehensive and innovative educational experience.

- d. Describe any proposed extra-curricular or co-curricular activities or any other student- focused programming the proposed school will offer, including when they will begin, how often they will occur, and how they will be funded.

LEAD Southeast Elementary school will aim to offer a diverse range of extra-curricular and co-curricular activities throughout the academic year. In the fall, students will be able to participate in cross country and basketball, fostering physical fitness and team collaboration. Spring semester will feature soccer and monthly music performances for families, providing opportunities for both athletic and artistic engagement. Additionally, spring will see the initiation of debate sessions, enhancing critical thinking skills. Funding for these activities will be sourced through a network fundraising, community sponsorships, and potential school fundraisers to ensure accessibility for all students.

- e. If Saturday School, summer school, additional remediation and tutoring after school hours, or other after school programming will be offered, describe the program(s), including those in alignment with Tenn. Code Ann. § 49-6-3115.
 - 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?

Before and After Care

LEAD Southeast Elementary will plan 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 for this service. The projected schedule will be 7:00-7:45 a.m. for morning care, and 3:30-6:00 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. Upon approval of our charter application, we plan to finalize partnership agreements for before and after care. However, should we not be able to come to a final agreement, we are prepared to provide our own services outside of normal school hours and have included the related expenditures within our school budget.

Starting in second grade, students who are reading significantly below grade level according to MAP will have opportunities to receive additional targeted Foundational Reading Skills support multiple times after school. Teachers will use the K-1 CKLA Modules to fill gaps based on students' needs. This will be provided by certified teachers who have received targeted Science of Reading training, and a stipend will be provided to them for their time.

Additionally, starting the summer after year 3, learning loss bridge camps will be available for eligible students who do not score proficient on grade level TNReady ELA assessment. Rising grade 3 students who maintain a ninety percent (90%) attendance rate at the camp, and demonstrate adequate growth on the post-test administered to the student at the end of the learning loss bridge camp, may be eligible for promotion to grade 4 after these camps.

Section 1.7 - Special Populations

In this section:

- a. Describe the experience of the leadership team in working with special populations.

LEAD Public Schools has extensive experience working with special populations. LEAD's zoned schools serve populations of students where between 12% to 16% of students have disabilities and 23% to 66% are English language learners. LEAD currently operates turnaround and new start charter schools that offer a continuum of services from most restrictive (i.e., homebound, one-to-one aide, self-contained special education classrooms) to least restrictive environment (i.e., Inclusion, consultation, etc.). All LEAD schools support English language learners through a range of services including a built out Newcomer program with tailored SIFE (students with interrupted formal education) support. Support for special populations exists at both the network and school levels, and leadership roles for diverse learners are staffed by those with extensive experience, ensuring that our most vulnerable learners are guided by leaders best equipped to support them.

At the network level, LEAD has several leadership members devoted to the achievement and success of special populations. LEAD currently employs both a director of exceptional education instruction and a director of exceptional education compliance. Our director of exceptional education compliance has more than 20 years of experience serving students receiving special education, both as a teacher and providing district-level support. Our director of exceptional education instruction has over ten years of experience as a classroom teacher, school-based exceptional education director, and consultant for a Nashville-based organization providing professional development for schools serving large populations of diverse learners. The directors are responsible for setting the vision for exceptional education (ExEd) at the network, ensuring the development and fidelity of academic programming for all ExEd students, the development and training of all instructional staff in how to drive outcomes for ExEd students, and ensuring compliance with all laws and regulations related to exceptional education students.

The director of English language learners works as a part of the network support team (NeST), specifically supporting English learners at each LEAD campus. The current director has more than 13 years of experience, and is responsible for setting the vision for English learners at the network, ensuring the development and fidelity of academic programming for all EL students, the development and training of all instructional staff in how to drive outcomes for EL students, and compliance with all laws and regulations related to English learners. The director of EL manages a network EL coordinator, who promotes and supports EL instruction and provides recommendations that support compliance for EL policies and procedures.

Additionally, the network has a director of MTSS, who has eight years of experience as both a classroom teacher and former exceptional education director, and ensures all students are receiving the tailored level of individual support they need to thrive.

Each of these positions are supervised by the chief academic officer. LEAD's current chief academic officer has a master's degree in special education from Vanderbilt University, spent ten years as a special education professional in the Hospital School Program at The Monroe Carell Children's Hospital at Vanderbilt, and served

as the TCAP-Alt program manager in the Division of Special Education for the Tennessee Department of Education.

Each year, network leadership meets with the school principal and relevant school team members to analyze the needs of current and incoming students. This analysis drives both adjustments to the schedule through a diverse needs mapping process as well as a hiring plan. The hiring plan, at a minimum, meets the basic requirements of the special education program staffing plans. Staffing ratios are determined by the individual needs of the students served and include an exceptional education instructional manager, paraprofessionals, and certified teachers.

- b. 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 (d), (e), (f) and (g)?

LEAD Southeast Elementary School will be ready to allocate resources for two exceptional education teachers, catering to the needs of students in both K-2 and 3-5, whether they require services in an inclusive or pull out setting. Moreover, our planning includes the provision of a life skills program staffed by a minimum of one ExEd certified teacher and support staff. The instructional manager will play a crucial role in coaching all ExEd staff, ensuring optimal services for students with disabilities to thrive in the least restrictive environment. To enhance our exceptional education services, LEAD collaborates with a third-party provider for various exceptional education-related services, encompassing speech and language therapy, occupational therapy, physical therapy, hearing services, vision services, and psychological services.

Additionally, our approach to English Language Learners (ELL) hiring and structure is tailored to the specific needs of students in the school. While the Newcomer Academy thrives at the middle school level, LEAD Southeast Elementary is well-prepared to institute a similar model at the elementary level if the need arises. Education assistants also play a vital role in supporting EL classes as required. Under the guidance of an EL instructional manager, all EL support staff receive coaching to ensure EL students receive quality support and instruction, facilitating the development of their language skills.

In a concerted effort, all school-based ExEd and EL instructional staff collaborate to provide ongoing professional development and in-class coaching for the entire school staff. This comprehensive approach aims to disseminate best practices for teaching diverse learners, offering both proactive and reactive measures to address emerging trends and ensure an inclusive and supportive learning environment for all students.

- c. 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?

The key to effectively preparing to support special populations is using the individual needs of each student as the guide. LEAD Southeast Elementary, with its "all means all" promise, will be the school where the family of any child can trust that their child's needs will be met. The following tools are used to ensure follow through on this promise:

- **Schedules driven by student needs:** Network leadership will meet with school leadership prior to the start of the year to map student needs based on IEPs, ILPs, and available data, including previous years' ACCESS and TNReady scores if available. This mapping process will drive student schedules and determine exact hiring needs. Additionally, certain times in the schedule allow for small group instruction, and who receives what type of instruction during that time will be determined by additional screening, student IEPs, ILPs, and available data. In addition to services in more inclusive settings, LEAD Southeast Elementary School will provide special education services to support students with low incidence disabilities. These students will receive vocational and life skills opportunities. Students with these needs will also receive modified programming, lessons, and activities in order to engage in the same activities as their peers. Material will be consistently taught at the student's level and in reference to their IEP goals to promote continual learning growth.
- **Collaborative approach to writing, implementing, and monitoring quality individualized instructional plans for students:** Teams – consisting of general education teachers, diverse learner teachers, families, administrators, and service providers – work together to develop IEPs and ILPs that will drive the level of support diverse learners receive. Progress monitoring through Fastbridge for students with IEPs and formative language assessments for EL students helps the team stay apprised of individual student growth. Fundamental to diverse learner support is increased communication. Within the school building, communication concerning student performance and support occurs on a weekly basis. Teachers also provide formal communication concerning student performance in ILPs and IEPs. In addition, consistent communication between teachers and families is paramount and is expected to occur regularly, with school leadership supporting and monitoring this.
- **Professional development to help all educators meet the needs of diverse learners:** At the network level, our academic team works closely with instructional managers and assistant principals to provide professional learning focused on differentiated instruction, behavior support, and compliance. In collaboration with network core content area directors, training focused on serving diverse learners across all content areas is routinely delivered. At the school level, instructional managers work with all teachers to monitor the data of diverse learners and create reteach plans targeting trends. Instructional managers also look for and develop instructional delivery and planning techniques to support diverse learners. Furthermore, ExEd and EL teachers and instructional managers commit to ongoing professional development to optimize instructional practices for student learning. For example, members of the LEAD's ExEd team attend the Council for Exceptional Children's annual conference to learn the most recent strategies for ExEd interventions. These strategies are brought back to teachers. In addition, all ExEd teachers and support staff are trained annually in crisis prevention and intervention. ExEd and EL instructional managers participate monthly in network-wide professional learning through the coaching program.
- **Recruitment and staffing with highly qualified teachers:** LEAD Southeast Elementary School will employ qualified, appropriately licensed personnel with experience in classroom differentiation and subject matter strategies for all of its positions, but potential candidates for positions at LEAD are also evaluated according to their personal and professional alignment with the Ethos of the charter. All teaching and support staff will possess or develop sufficient knowledge of special education and EL

instruction best practices necessary to facilitate learning and develop individualized plans for students. Additional itinerant staff will be provided through an outside partner (psychologist, speech, OT, PT, vision, hearing) for the provision of related services in accordance with a student's Individual Education Plan (IEP) or 504.

d. Describe the following related to students with disabilities:

- Methods for identifying students with disabilities and avoiding misidentification or over-identification;
- 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).

LEAD Southeast Elementary School will use the following methods for identifying students with disabilities and avoiding misidentification or over-identification: LEAD operates in accordance with the Child Find component of the Individuals with Disabilities Education Act (IDEA-04') that requires states to identify, locate, and evaluate all children with disabilities ages 3 to 21. It is a continuous process of public awareness activities, screening, and evaluation to locate, identify, and refer children as early as possible. The LEAD network originally designed its protocols to identify students who may be in need of special services based on those provided by MNPS. These protocols include providing students with routine screenings for vision and hearing and progress monitoring student performance and students' response to instructions and intervention (RTII). LEAD will follow the Child Find process, including forming a support team (S-Team), in order 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. MTSS and support teams work in tandem to efficiently identify and support students.

LEAD does not view MTSS as something specific to special education services; rather, it is a whole-school intervention model that improves educational outcomes for all students (including English language learners, at-risk students, underperforming students, and gifted and talented students). If MTSS is being implemented effectively, students will not be tested unnecessarily or misidentified for special education services. With MTSS, there is a continuum into which students fall based on the number and level of interventions they need to be successful both academically and behaviorally. The following steps are followed in the support of students who require intervention and do not currently have an IEP:

- **Tier 1: Universal Level** – Approximately 80% of students fall into this level and their needs are typically met in the general education classroom through a continuous cycle of standards-based instruction, assessment, analysis, re-teaching using different strategies when needed, re-assessment, etc. We expect teachers to differentiate lessons, adapt learning targets, model concepts, provide instruction, and develop activities to address a range of learning styles and educational needs. Teachers assess

student progress regularly and identify those struggling to keep up, in which case, they are placed in Tier 2 (Targeted Level).

- **Tier 2: Targeted Level** – Approximately 5% to 15% of students fall into this level and they need more targeted, specific interventions to find academic and behavioral success. Students needing intervention at this level are placed in small working groups within the classroom to focus three or four times a week on more targeted intervention by the teacher, which might include one-on-one tutoring, small group support, and other supports. If a student continues to not make sufficient academic progress, a more intensive intervention plan will be put in place.
- **Tier 3: Intensive Level** – Approximately 5% of students fall into this level and they require the most intense level of interventions because their actual performance is significantly below their expected benchmarks. These interventions usually involve one-on-one support, push-in support, pull-out support, or small group support. When learning objectives are met through intensive interventions, the student may be moved back into Tier 2 support. Students who remain unresponsive to Tier 3 interventions will be referred to the support team (S-Team) for evaluation to determine the presence of any learning disabilities. 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.

This 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.

LEAD employs a similar process for students in need of additional behavioral support. First, the school forms an S-Team. Collaborating with the student and family, the team creates a support plan with specific behavioral interventions. The team executes the intervention plan for four to six weeks in Tier 2 while collecting data on the targeted behaviors. If the behavior does not improve, the student is moved to Tier 3 behavior support. A new plan with increased supports and scaffolds is developed and implemented. If the student still does not meet the goals in the intervention plan, they are referred for an evaluation. LEAD has school-based leaders trained in conducting Functional Behavior Assessments (FBAs) and creating Behavior Intervention Plans (BIPs). LEAD also partners with the Project Play Therapy for additional support from a behavior analyst if needed.

The following instructional programs, practices, and strategies will be employed to provide a continuum of services, ensure students' access to the general education curriculum, and ensure academic success for students with disabilities. In full compliance with the Individual with Disabilities Education Act (IDEA), LEAD is committed to providing a continuum of services in the least restrictive environment that is appropriate to the individual student's needs. This means that students' primary placement will be in general education classrooms as much as possible. First the school principal and then, ultimately, the exceptional education instructional manager and teachers work with general classroom teachers so they know how to provide effective accommodations and modifications for students. For example, depending on the disability, a student's IEP might include strategies such as oral testing, extended time, alternative formats, using computers rather than writing, scribes, and assistive technology. The special education teacher might work with general education teachers for inclusion support, co-teaching, support, and in designing instruction. If needed, the

special education teacher may also advise the general education teacher regarding strategies for ensuring the student's behavior does not interfere with their academic success.

Some students will require pull-out support and in these situations, the student works with the special education teacher individually or in a small group. The instructors will use a variety of tools to support students' learning needs depending on the disability and identified strategies. Pull-out support might also come from other itinerant service providers such as occupational, physical, and speech therapy.

LEAD anticipates managing IEPs and progress monitoring through the online systems currently used, TN Pulse and Fastbridge. LEAD trusts that this system facilitates efficient management of IEPs and progress monitoring as LEAD currently uses these systems across the network of six schools with success.

All students will be challenged on their independent learning levels through a rigorous curriculum, and the use of adaptations and accommodations per their Individualized Education Plan (IEP). LEAD currently supports the movement of students with disabilities into less restrictive environments and increased interactions of students with disabilities with non-disabled students. This practice will continue and be part of the culture of LEAD Southeast Elementary. The program of instruction for students with disabilities in LEAD Southeast Elementary shall be responsive to the required sequence of courses and related curricular activities provided for all students. As the focus will be on an inclusive setting and delivering instruction in the general education classroom, an emphasis on staff development will be maintained to ensure that all classroom teachers use effective strategies for all students to experience success.

LEAD Southeast Elementary will make special education services available to exceptional children, including both students with disabilities and gifted students, in accordance with the Tennessee Department of Education and the Individuals with Disabilities Education Act as reauthorized, including:

- An equal opportunity for all children who may not be denied on the basis of a disability
- A written Individualized Education Program (IEP) for all students identified and qualified as having a disability and receiving special education services
- A free and appropriate public education program (FAPE). This program is to be determined on an individual case-by-case basis depending on each student's unique needs and which may be challenged by the student's parent(s) through due process procedures
- A least restrictive environment
- Due process requirements which include notification of parent(s) of the intent to evaluate for special education and consent to this process by the parent(s)

All students with IEPs have an annual meeting (which includes the parents, special education teacher, general education teacher, and school leader). At the annual meeting, the student's IEP is reviewed to ensure that the student is meeting the IEP goals or making appropriate progress. Strategies may be refined or modified based on the student's progress. A parent can submit a special request to have a student's IEP reviewed or modified before the annual evaluation is scheduled. In addition, any time a change is made to an IEP, the special

education team must call a formal meeting that involves the student's parents/guardians, general education teacher, and an administrator.

All LEAD Southeast Elementary School students with disabilities will be monitored for progress and success throughout the year. In addition to Fastbridge progress monitoring, ExEd teachers engage in IEP goal tracking to determine students' progress toward IEP goals. This information drives quarterly progress reports. Assessments that students take throughout the year are also analyzed by subgroups so teachers and leaders can determine any gaps that exist in student growth between those students with disabilities and those without.

To support failing students with disabilities, ExEd teachers and the ExEd instructional manager take a number of steps. First, the ExEd instructional manager works with the ExEd teacher to delineate between supporting students and helping students with executive functioning needs. Here are some actions that the ExEd instructional manager and teacher might then take:

- Reach out to general education teachers about students of concern and get additional context on student performance
- Provide updated IEP at-a-glance for teachers to have in hand when calling parents about failing grades
- Read aloud missing tests
- Communicate with parents about why the student is failing if it is not due to deficits (Ex. calling parents to let them know that the student has received three opportunities to complete test corrections, but is choosing not to do so for homework)
- Hold make-up tests/assignment lunch sessions
- Work with a student on homework or provide a reteach during arrival
- Help with backpack organization to support with loss of papers (homework or test corrections)
- Check-in with students after progress reports to review grades and create goals

As an added measure, the director of exceptional education provides each ExEd instructional manager with a list of students with IEPs who are in danger of failing grades based on progress reports. All instructors with ExEd students failing their course meet one-on-one with the ExEd instructional manager at the conclusion of the quarter. This meeting helps shape the change in support needed for the next quarter or semester.

The vast majority of students with disabilities are working toward the general standards/courses just like their non-disabled peers. The student's Individualized Education Program (IEP) identifies the child's strengths and needs, academic goals, and academic and behavioral accommodations necessary to support success with the academic standards and coursework. LEAD provides all students with exceptionalities a Continuum of Services in an effort to put all students on the track of graduating with a general education diploma.

Students with disabilities who have a significant cognitive disability starting in third grade and meet TDOE criteria may be eligible to participate in an alternate assessment and pathway. This will be reviewed case by case. Students with significant cognitive disabilities that meet the State's alternate assessment eligibility criteria can still earn a high school diploma if they meet the graduation requirements. Therefore, reviews of each student will be carefully considered and determined as an IEP team. Students who have cognitive disabilities participate in the alternate assessment that require extensive modification to their curriculum are

able to pursue an alternate pathway to a high school graduation. This pathway consists of functional academics, workforce readiness/career preparation, and transition components that the student must meet in order to receive a diploma and mirrors the requirements of the traditional graduation pathway. The LEAD Southeast Elementary School's exceptional education team will be aware of the different pathways for students and work to ensure an early foundation for all students with IEPs to be on track to meet graduation requirements.

Say Dyslexia

The Tennessee "Say Dyslexia" law requires school districts to screen all students for characteristics of dyslexia through their existing Response to Instruction and Intervention (RTI²) procedures. School teams will use screening assessment data and information to determine a student's need for dyslexia-specific intervention. This law, which is similar to many recently passed across the country, emphasizes the need to explicitly use the term "dyslexia" when working with students at risk for reading failure and demonstrating characteristics of dyslexia. While schools have been implementing Response to Instruction and Intervention (RTI²) and identifying students with reading needs historically, they had not been using the term dyslexia until now.

The LEAD Public Schools Say Dyslexia Guidance reviews in detail the practices and procedures for implementing the Say Dyslexia law, including the development, implementation and monitoring of ILP-Ds. Students whose assessment data places them in an ExEd Intervention or in Tier III reading intervention meet the criteria for Say Dyslexia and will be documented as such.

- e. Describe the following related to English Learners (EL) in accordance with State Board of Education Rule 0520-01-19-.03:
 - 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.

LEAD receives transfer students and newcomer students, those who have recently immigrated to the United States. When students register, if they have never before enrolled in a U.S. school, LEAD staff ask them to complete a Home Language Survey. If anything other than English is marked in any of the survey questions, the student goes to the MNPS Office of English Learners to be screened using the WIDA Online Screener. While we anticipate that the partnership with the MNPS Office of English Learners will continue when we open LEAD Southeast Elementary, the EL team at LEAD has the capacity to screen students at the NeST using the same tools used by MNPS if necessary.

If students have been enrolled in a WIDA state school before, LEAD secures previous ACCESS scores and the original Home Language Survey. The scores from either WIDA ACCESS or the WIDA Online Screener determine the EL services students receive. Students below a 2.5 enter into our sheltered

English language development class. The majority of these students have immigrated to the country in the last year. Students who score between a 2.5 and a 3.5 are put into mainstream classes and are provided English learner services through co-teaching in the English language arts classroom. Some students demonstrate higher proficiency – above a 3.5 in reading, writing, and one other domain – qualify for individualized services and have fewer minutes of consistent ESL Services. LEAD provides staff the opportunity to get an endorsement in English as Second Language by paying for the programs and costs of PRAXIS exams. The director of EL also supports teachers taking the Praxis exam through tutoring and study groups.

The LEAD EL department aims to provide an equitable education with research-based strategies for multilingual students by developing and supporting all professionals who work with and educate multilingual students. LEAD’s English language learner programming is aligned with the Tennessee English Learner Framework and English Second Language Manual. The model and supports utilized at LEAD differ by student ACCESS score. Here is a general overview of the specific models utilized at LEAD by ACCESS score:

- **1.0-2.5:** Pulled out into a sheltered ELD class during their English block or Newcomer Academy, depending on the school population.
- **2.5-3.5:** Scheduled into cohorts with EL supports in the English classes. These students receive instruction in general education courses in which English is the primary language and receive language supports from an EL certified teacher or co-teacher.
- **3.5-4.5:** If students meet the requirements specified in State Rule 0520-01-19, some students qualify for “individualized services” and may only receive language supports as needed.
- **Transitional:** Transitional students are monitored at each grade report. Transitional students with low performance in their content areas have monitoring forms filled out by their teachers, identifying root causes of low academic performance, and suggestions with additional supports to ensure success.
- Students that are dually-identified (EL and ExEd) have supports outlined in their IEP and ILPs. We map services prior to the school years beginning to ensure that all diverse learners will have access to the entire menu of services we offer at LEAD.

This service model allows for students to receive the services that are most in line with their level of language acquisition. This will be achieved in our elementary schools by hiring teachers with dual certification in elementary education (K-6) and English as a second language (K-12). At minimum, we will have one dually certified teacher in each grade level, but our goal is to hire (or support licensure endorsement for) as many dually certified teachers as possible. In addition to the outlined service delivery model, all staff work to support students with finding success in their class. Some regular actions include the following:

- Instructional managers provide feedback on lessons with a particular eye toward accessibility without diminishing rigor.
- Instructional managers observe classrooms often and provide coaching on instruction, including EL strategies.
- Instructional managers and EL coordinators provide professional development and support geared toward the needs of school staff.

At the network level, English learners are supported by the director of EL and the network EL coordinator. At the school level, EL teachers are supervised by an instructional manager. EL instructional managers participate monthly in network-wide professional learning.

Each year, the director of EL and director of human resources meet with the school principal and relevant school team members to analyze the needs of incoming students and develop a hiring plan. The hiring plan, at a minimum, meets the basic requirements of the ELL program staffing plans in compliance with the 1:35 ratio. While staffing ratios are determined by the individual needs and numbers of the students each year, they typically include a minimum of two EL teachers. LEAD has a relationship with Lipscomb University to offer financial support to teachers seeking to become EL certified through college-level courses and appropriate exams in order to increase teacher knowledge and positive impact of instruction on diverse learners.

English language arts class will offer inclusive services in which a certified EL teacher pushes into a general education class to offer students access to the grade-level-appropriate curriculum with more intensive supports, differentiation, and accommodations to ensure the successful mastery of grade-level content. During intervention, students may receive intensive instructional English instruction taught by a certified EL teacher specifically designed for students with little to no English language capacity. Students who are nearing their exit of the ESL program may receive services from their general education ELA teacher who is also EL certified. These teachers have the knowledge and experience to meet the unique needs of EL students who are just shy of English language proficiency. Once a student has exited the ESL program by achieving a proficiency level of 4.4 or higher composite score and a 4.2 or higher Literacy score on the WIDA ACCESS Assessment, they no longer receive direct services but are monitored by our certified EL staff and low performing monitoring forms during their four years of transition. If at any point, the student shows signs of academic struggle due to language acquisition, which cannot be met through general academic intervention, they may be re-entered into the ESL program receiving services at a level most appropriate for their needs.

The TN Pulse platform is utilized at LEAD to house Individual Learning Plans (ILPs). ILPs are created for students within the first 30 days of school and updated quarterly. LEAD uses a rubric to score ILPs, ensuring that they are not just compliant but also highly effective. ILPs have student demographic information, language goals, and growth trajectories based on their WIDA ACCESS scores and monitored through their Formative Language Assessments (FLAs). ILPs also have testing and classroom accommodations and dedicated ESL services, all of which can be adjusted throughout the school year as students' language proficiency fluctuates.

EL teachers have access to TN Pulse to view these accommodations, and there is an internal Diverse Learner Dashboard which has teachers' rosters of students, filterable by class period, to view accommodations for English learners, students with 504 plans, and exceptional education students. This tool is helpful for teachers to plan for testing and instructional accommodations, but TN Pulse is the platform that houses our ability to monitor and evaluate the progress and success of EL programs.

LEAD monitors and evaluates the progress and success of EL students using ACCESS-aligned formative language assessments (FLAs) that are given across the district three times per year, created by EL leaders, and entered into shared platforms. Data dashboards help teachers and leaders visualize and monitor students' language

proficiency progress. This data is used to update Individual Learning Plans which includes which accommodations, interventions, and language goals. Additionally, assessments given within schools are analyzed by subgroup data, including ELL student progress, and response plans will be generated to address gaps should they emerge.

EL Methodology: LEAD Southeast Elementary, in alignment with the Tennessee Department of Education's English as a Second Language Manual, is set to introduce Specially Designed Academic Instruction in English (SDAIE), tailored for all proficiency levels. SDAIE prioritizes reducing barriers to learning, employing adjusted language, utilizing contextual hints, engaging multiple senses, providing understandable input, conducting regular comprehension checks, employing both formative and summative evaluations, structuring lessons effectively, and integrating content-driven plans. The essence of SDAIE models lies in seamlessly intertwining English language acquisition with content teaching. Academic vocabulary gains significance through practical application, as students grasp the relevance of the words they learn. Additionally, students will have access to manipulatives and realia to gain a deeper knowledge throughout all subject areas. SDAIE strategies will be systematically integrated across all content domains to secure academic excellence for the diverse array of learners represented at LEAD Southeast Elementary.

Reducing Barriers to Learning: SDAIE, aims to overcome language obstacles by offering tailored language support and contextual cues, enabling EL students to grasp and participate in the content more effectively. Teachers play a crucial role in this process by deeply understanding the students' prior knowledge and experiences, allowing them to highlight what students are already familiar with and build upon that foundation. By leveraging students' existing knowledge, SDAIE dismantles barriers for all learners.

Engaging Multiple Senses: Incorporating a range of strategies, SDAIE aims to engage young learners through diverse sensory experiences, fostering interactive and accessible learning environments. This method enriches comprehension and memory as students encounter concepts through multiple modalities. Utilizing visuals, real-life objects (realia), academic language from past lessons, and various connections to prior knowledge, experiences, and familiarity are integral aspects of every lesson. Additionally, integrating Total Physical Response (TPR) into instruction deepens retention and understanding by enabling students to physically interact with concepts.

Providing Understandable Input: By delivering content in a comprehensible manner, SDAIE aids EL students in grasping new concepts more effectively. Teachers prioritize clear communication, employing techniques such as visual aids and simplified language to ensure students comprehension. Strategies like adapted speech, visual supports, and instruction broken into manageable chunks provide comprehensible input. Through these methods, teachers ensure that students comprehend the material, regardless of their proficiency level in English.

Regular Comprehension Checks: Facilitating frequent assessments of comprehension throughout lessons, the SDAIE methodology ensures that English Learner students remain aligned with the lesson objectives and can request clarification as necessary. This pedagogical approach fosters active engagement and enables educators to gauge students' understanding in real-time, allowing for timely adjustments to instruction to meet the

diverse needs of the learners.

Formative and Summative Evaluations: SDAIE incorporates both formative and summative assessments to monitor student progress and offer feedback. This thorough assessment methodology empowers teachers to identify areas needing improvement and acknowledge students' successes. By leveraging WIDA data, students are organized into groups, and personalized growth objectives are established. These goals are regularly reviewed through weekly stack audits of students' work samples to adapt Individualized Learning Plan (ILP) objectives as necessary, ensuring continuous and tailored advancement. Additionally, the utilization of MAP and FastBridge data further enriches the support provided to students, facilitating targeted interventions and customized instruction.

Effective Lesson Structure: SDAIE places a strong emphasis on the creation of well-structured lessons that effectively scaffold learning for EL students. Teachers invest careful thought into planning and sequencing activities, ensuring they not only build upon students' existing knowledge but also provide ample support for their language development. This approach aims to foster a supportive learning environment where students can confidently engage with the material and progressively enhance their language skills.

Integration of Content-Driven Plans: Integrating language acquisition seamlessly with content teaching, SDAIE enables EL students to learn English while actively participating in all academic subjects. This integrated approach adds depth and relevance to learning experiences, thereby boosting students' motivation and retention levels.

Practical Application of Academic Vocabulary: Through SDAIE, EL students deepen their understanding of academic vocabulary by applying it in practical contexts, fostering stronger language skills. This hands-on approach highlights the real-world relevance of learned words. Each lesson aims for students to acquire new knowledge. A student who effectively grasps and starts using new academic language by the lesson's end demonstrates progress in mastering the vocabulary.

Enhanced Grammar Comprehension: By employing SDAIE strategies, EL students are guided to comprehend grammatical concepts within meaningful contexts, such as distinguishing between active and passive verb tenses. Through exposure to authentic situations, students cultivate a deeper understanding of English language nuances. Their grasp of grammar deepens as they engage with meaningful texts, enabling them to navigate grammatical choices effectively.

Multicultural Perspectives: In every lesson, students bring their own unique blend of prior knowledge, personal experiences, and cultural backgrounds. Each student's contribution is significant to the collaborative learning process, and teachers acknowledge and value the diversity each student brings. Teachers not only recognize the cultural differences present in their classrooms but also actively promote multicultural perspectives to foster a sense of belonging among all students.

- f. 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.

LEAD Southeast Elementary will maintain a comprehensive system for identifying at-risk students through our Student Needs Analysis Protocol (SNAP). Academic and culture data are reviewed in accord with continuous improvement cycles. In these cycles, we use the data to formulate and implement a plan, gather and review data in response to the plan, and make refinements to the plan based on the new data.

Data pertaining to attendance, behavior referrals, and appropriate academic measures (depending on grade level) are collected and monitored using Mastery Connect, DeansList, and our internal SNAP dashboard. There are criteria within each category (attendance, behavior, academics) that equate to a numerical "at-risk score." An at-risk student tracker is updated in the middle of each quarter to reflect the most up-to-date at risk score for every student. Immediately following the tracker update, school data teams convene to accomplish the following:

- Identify trends, reflect on current practices that impact key trends, and determine whole-school/Tier 1 actions to address the key trends
- Identify key students and assign individual action plans
- Review previous action steps/interventions and measure effectiveness
- Make adjustments if needed

Takeaways and proposed action steps from the data team meeting become agenda items for a grade-level team meeting that occurs within two weeks of the updated data analysis. In the grade-level team meetings, newly proposed interventions to support at-risk students as well as any decisions about ongoing interventions are finalized, and a plan for communication with students and families is developed. Interventions that are implemented are research-based and there is empirical evidence that they are effective specifically for the need demonstrated. Interventions include, but are not limited to, check-in/check-out, a staff mentor using a weekly/biweekly check in, community mentors who check in weekly, peer tutors, peer mentors, contracts, staff-supervised work time, or lunch/after-school tutoring. Every student intervention has a clear owner who is responsible for fidelity of implementation as well as benchmarking progress for students between mid-quarter data pulls.

When there is data to suggest that a student needs a more formalized support plan, he or she will be referred to begin the support team process. A support team (S-Team) is a team of school personnel that provides behavioral, social, emotional, academic, and attendance support for LEAD Public School students. The team consists of multi-disciplinary personnel to determine what resources are needed in order for a student to be successful. A student referred for an S-Team intervention is not necessarily being referred for exceptional education. However, this team may function as an intermediate step between recognition of a problem and formal referral of the student for a comprehensive evaluation.

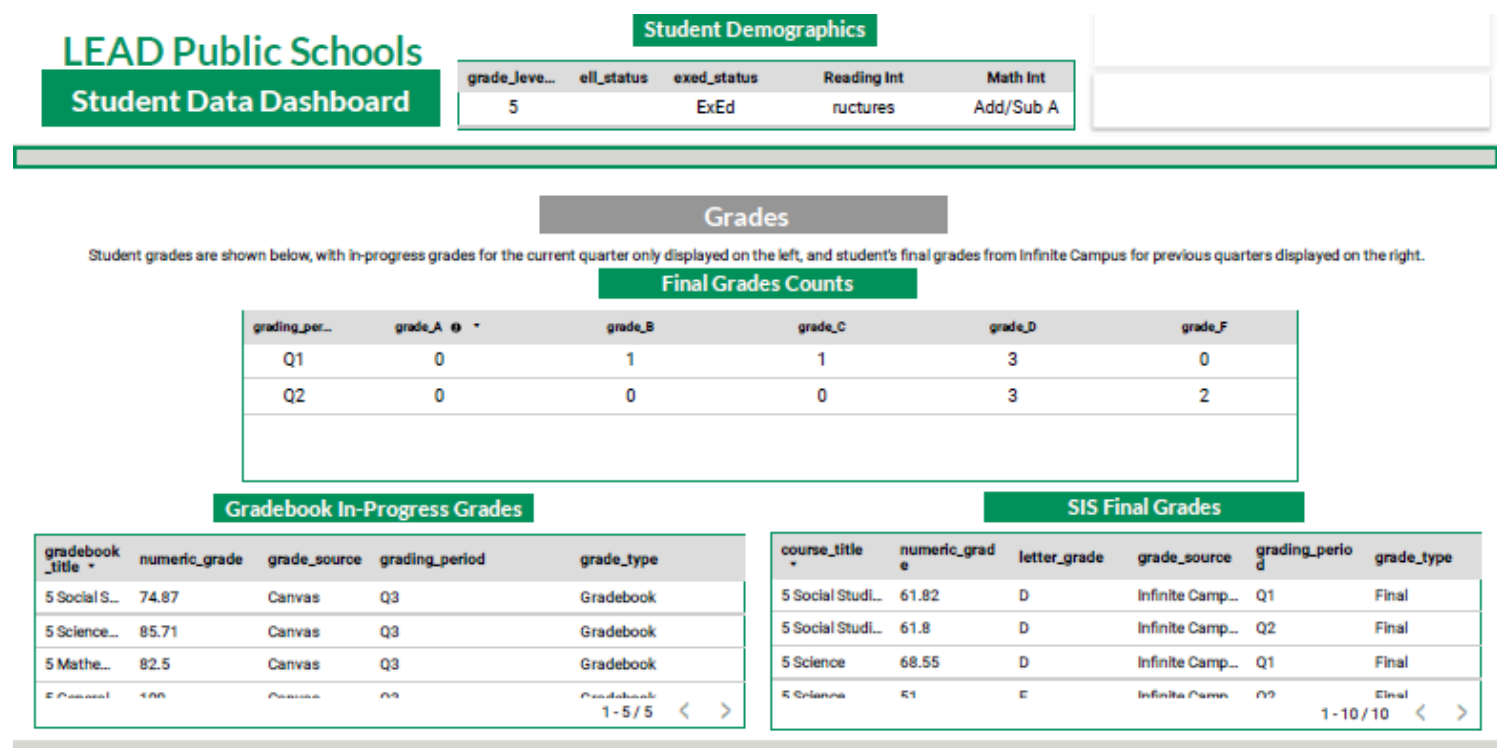
Teachers, staff, and/or parents/guardians who are concerned about a student can request an S-Team meeting to be held. The purpose of the initial S-Team meeting is to determine what interventions or supports are needed in order for a student to be successful in the learning environment. Members of the S-Team may include a teacher, school counselor, social worker, parent/guardian, principal, and assessment specialist (if appropriate).

S-Teams will:

- Review data in the area(s) of concern
- Brainstorm ideas to address specific concerns in the classroom
- Consider the hearing, vision, health, nutrition, and environmental factors of the student
- Determine interventions and who is responsible for the implementation
- Discuss future actions, progress, and outcomes
- Determine if there is a need to invite an assessment specialist to future meetings

The S-Team process is complete if interventions are successful and the student's academic performance, behavior, social emotion, or attendance improves. If the interventions are not successful, the team may consider further evaluation for a disability under Section 504 of the Americans with Disabilities Act or Special Education under the Individuals with Disabilities Education Act (IDEA).

To illustrate our data-driven approach, see below for an example of the Student Data Dashboard for a current 5th grader; a similar dashboard will be utilized for our elementary students.



Behavior

This section pulls data from both Deanslist and Infinite Campus. Suspension and attendance data are sourced from Infinite Campus, and are pulled every evening to reflect data as of the previous day. Behavior data points, such as incidents, ratio, and family communication, are pulled from DeansList each morning by 6am to reflect data as of the previous day.

Suspension

Total Suspensions
0

DeansList

No. of Incidents
8

Ratio
2.8:1

Attendance

PercentInAttendance
97.30%

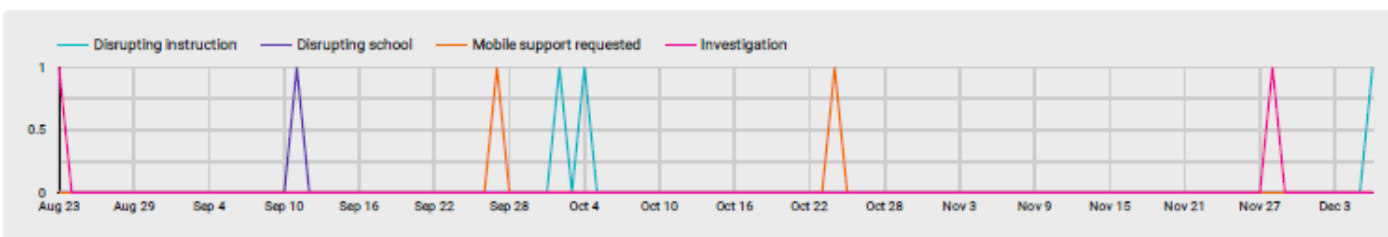
Absences
2

Date	Infraction Code	Type	Days Duration
No data			

	Phone	Text	Email	Letter	See details	Total
Parent/Relation	4	0	0	0	1	5
Student	0	0	0	0	1	1

[Click Here for DeansList Analysis Tools](#)

Incidents Over Time



category	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Disrupting instruction	0	0	2	0	1	0	0	0	0	0
Investigation	1	0	0	1	0	0	0	0	0	0
Mobile support requested	0	1	1	0	0	0	0	0	0	0
Disrupting school	0	1	0	0	0	0	0	0	0	0

Screening

This section includes data from various student screening tools. CMBR is a reading screener that students take three times a year. Student Risk scores are listed for a student based on their attendance, behavior, grades, and overall risk scores, as defined by the student risk tracker. Student tiers are also provided below, based on overall risk scores.

CBMR Screener

Fall 23 WRC	Fall GL Norm	Winter 23 WRC	Winter GL Norm	Spring 24 WRC	Spring GL Norm
82	142	No data	158	No data	172

Do The Math Screener

# Core - Unit 1 Score	Add/Sub - Unit 2 Score	Multi - Unit 3 Score	Div - Unit 4 Score	Frac - Unit 5 Score	Overall Score
2	0	1	0	0	3

MQ1 Attend 3	MQ2 Attend 2
MQ1 Behavior 3	MQ2 Behavior 4
MQ1 Grades 3	MQ2 Grades 3
MQ1 Overall 9	MQ2 Overall 9

Student Need (SNAP)

MQ1 Tier	MQ2 Tier
Tier 3	Tier 3

MQ1 Action Plan	MQ2 Action Plan	MQ3 Action Plan	MQ4 Action Plan
Behavior: Check-In/Check-Out			

Assessments

Various assessment data points are included below. Interim assessments are shown for this year, alongside TNReady performance bands from last year. Next, FLAs are shown above a student's previous year ACCESS scores, as well as their current ACCESS goals. ACT data includes all tests from both Practice ACT and the statewide ACT. Finally, NWEA MAP data is shown for the previous two years, including various metrics for achievement and growth over time.

Interim Assessments

IA Round	Achievement Level	Percent Correct	Subject	Staff Name
IA1	1	31.43%	5 English Language Arts	Maegan Bell
IA1	1-	16.67%	5 Science	Renita King
IA1	3-	50.00%	5 Social Studies	Ashley Ridley

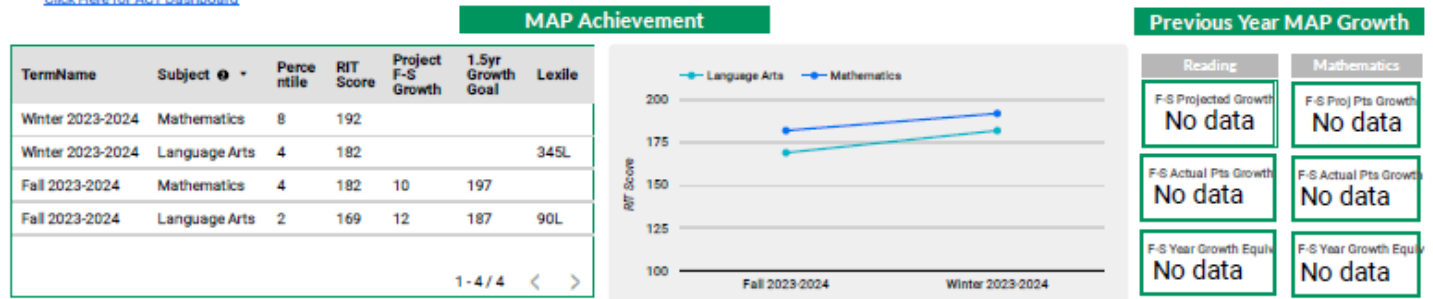
Previous TNReady Scores

ContentArea Code	ProficiencyClassification	school_year
null	null	null

FLA + ACCESS								
R1 Listening FLA	R2 Listening FLA	R3 Listening FLA	R1 Reading FLA	R2 Reading FLA	R3 Reading FLA	R1 Writing FLA	R2 Writing FLA	R3 Writing FLA
4.7	3.2		4.3	3.7		1.2	2.7	
R1 Speaking FLA	R2 Speaking FLA	R3 Speaking FLA						
3								
22-23 Assessment Type	22-23 Listening	Listening Goal	22-23 Reading	Reading Goal	22-23 Writing	Writing Goal	22-23 Speaking	Speaking Goal
ACCESS for ELLs 2.0	3.8	4.3	2.8	3.5	3.7	4.2	2.5	3.2

[Click Here for FLA Dashboard](#)

[Click Here for ACT Dashboard](#)



g. 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 opportunities the proposed school will employ or provide to enhance their abilities; and
- Plans for monitoring and evaluating the progress and success of intellectually gifted students.

LEAD Southeast Elementary School will prioritize the appropriate identification of students with exceptionalities including those who are gifted. Students who have not been diagnosed as gifted before entering elementary school may be identified through teacher and/or parent referral. Once referred for testing, a certified educational evaluator will determine eligibility based on the gifted matrix which covers achievement, creativity, and cognition.

With the identification of gifted, students will be educated based on an Individualized Education Plan (IEP) created by the student's IEP team. Gifted students may receive their services in a variety of formats, based on the individual student's needs. These options include, but are not limited to, academic acceleration through curriculum compacting, enrichment projects within the general education setting, and independent study. Student achievement will be monitored via IEP goals to ensure educational services are appropriately impacting a student's educational experience and success. This is in alignment with Tennessee Department of Education's State Plan for the Education of Intellectually Gifted Students (2010).

Section 1.8 - School Culture and Discipline

In this section:

- a. Provide as Attachment D the Student Handbook and/or forms that will be provided to or required of students and families.
- b. 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.



LEAD school culture has always been anchored in our Ethos, placing a high value on social and emotional learning. LEAD Southeast Elementary School will value culture as the foundation that supports all other aspects of our school. A positive school environment that prepares students for life and meets their daily needs is crucial to individual student success, including success within the classroom. LEAD is committed to improving our practices each year to

build our students up and grow them in ways that will result in the highest quality education, accessible by all. This is accomplished by the following:

- Emphasizing belonging in the school community
- Having clear and consistent high expectations
- Earning rewards and acknowledgment for meeting expectations
- Holding students accountable through restorative practices and appropriate consequences when they do not to meet expectations

LEAD's overarching objective is to reinforce cultural roots and instill a passion for learning in our students. By creating a safe and joyous school environment, we empower both our staff and students to emerge as LEADers within and beyond our school community. As we believe monitoring school culture indicators is a key success of overall health, we have included our school culture goals in Section 1.4.

To achieve our culture objectives and cultivate a positive academic environment, LEAD Southeast Elementary will utilize a variety of targeted programs and strategies:

Positive Behavior Interventions and Supports (PBIS): LEAD has established its cultural framework based on Positive Behavior Interventions and Supports (PBIS), a framework that positively shapes the school community and systematically enhances student behavior. Employing evidence-based practices, LEAD implements a tiered model of behavior support, contributing to improved student outcomes and academic success. PBIS, designed for the entire school, operates preventatively, and shifts the focus from negative behaviors to positive

expectations and interactions. In Tier 1, we place an emphasis on fostering positive relationships with all students and implementing a progressive response to problematic behavior. This means we utilize strategies to prevent poor behaviors from occurring, teach appropriate behaviors, acknowledge corrected behaviors, and address misbehavior. Additionally, LEAD utilizes a positive token economy to acknowledge students demonstrating school expectations, LEAD Ethos, and SEL skills. Teachers receive support through PD, coaching, and norming walkthroughs to ensure clear and consistent expectations in all spaces and to emphasize restorative relationships. At risk, Tier 2 students receive classroom and small group support. High-risk, Tier 3 students receive Individualized Functional Behavior Assessments (FBAs) and Behavior Intervention Plans (BIPs) and possible exceptional education evaluations.

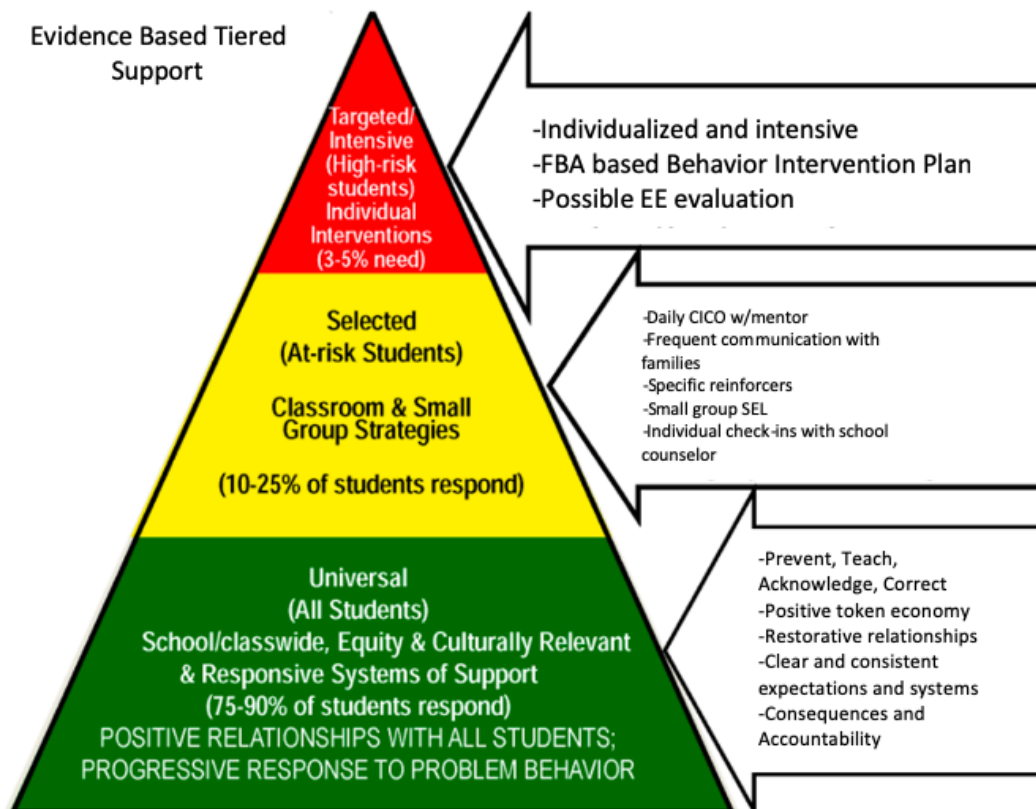
- **Tier 1 Universal Support**

At LEAD Southeast Elementary, we will aspire to create a positive and joyful learning environment through our school-wide PBIS program. We will achieve this through frequent, actionable feedback that reinforces positive choices and addresses behaviors not in line with our expectations and Ethos. During the initial weeks of school, we will guide students in understanding our behavioral expectations, teaching them our systems, and instructing them on how to appropriately respond to feedback.

Valuing consistency as the cornerstone for providing a safe and predictable environment, LEAD emphasizes the commitment to consistent positive and negative consequences. This dedication not only fosters academic success but also communicates care for students' well-being. Students will earn merits by demonstrating expectations, excellent academic behavior, SEL skills, and LEAD Ethos. They can then redeem the merit points for various incentives.

Teachers undergo regular training in key moves aligned with school expectations, reinforced through coaching to uphold these systems. Consequences are viewed as opportunities for teaching and guidance, approached through a restorative lens that considers diverse perspectives. Celebrating successes and learning from mistakes, LEAD encourages authenticity and continuous improvement. LEAD employs trauma-informed practices and culturally relevant teaching, and maintains high expectations for students. The focus extends to close-loop conversations and community reintegration, emphasizing support rather than expulsion. Proactive and reactive measures, including mobile support from campus student support teams, ensure students spend maximum time in class.

A school-wide behavior matrix will outline the rules for all areas throughout the school. Corresponding posters featuring visuals will be displayed in these spaces for easy reference. In addition, every classroom will establish a set of rules aligned with our school expectations (Be Safe, Be Respectful, Be Responsible). These rules will be crafted collectively, fostering a sense of community, and ensuring that each student is actively involved and invested in the process. This collaborative approach aims to cultivate a shared understanding and commitment to the guidelines that govern our classroom environments. Students must have a predictable and positive environment in order to learn in every classroom, and faculty must be unified in providing this. In addition to the school-wide data collection protocol, staff will use key moves to prevent and correct problem behavior.



● Tier 2 Small Group Support

Tier 2 interventions play a crucial role in supporting students who are not responding adequately to the school-wide Tier 1 system. This support aims to assist 10-25% of our students. Tier 2 interventions are continuously available, require minimal effort from teachers, are aligned with school-wide expectations, and are evidence-based approaches. Identification of Tier 2 students is based on DeansList data, discipline data (e.g., ODRs, ISS, OSS), attendance, teacher nominations, parent/guardian service requests, and assessment data. The MTSS-B team convenes every three weeks to identify students needing Tier 2 support, review current Tier 2 student intervention data, and make any necessary intervention adjustments. Parents/guardians of students identified for Tier 2 support will receive a Tier 2 notification letter outlining the intervention. Tier 2 interventions include, but are not limited to, Check-In Check-Out (CICO), Breaks are Better, Self and Match, structured breaks, behavior contracts, social skills groups, and 2x10. It is imperative for all stakeholders to collect and document data according to procedures. Students are only provided additional interventions when documentation supports the need.

● Tier 3 Individual Support

Tier 3 interventions represent a highly intensive and personalized approach designed to meet the specific needs of individual students. This specialized support is targeted for 5% of our student population. The decision to transition a student to Tier 3 is based on data indicating a lack of response to Tier 2 interventions after 6-8 weeks or when behaviors become pervasive and pose a danger. Before progressing to the Tier 3 stage, it is crucial for all stakeholders to have collected Tier 2 data and implemented interventions with fidelity. This ensures a comprehensive understanding of the student's needs and a systematic approach to addressing them effectively. Following the decision to move a student to Tier 3 support, the school will convene a Support Team meeting with all necessary stakeholders. This collaborative meeting aims to assess the current situation comprehensively and determine the most appropriate next steps for the student. Potential actions include conducting a Functional Behavior Assessment (FBA) and developing a Behavior Intervention Plan (BIP), providing individual counseling, engaging Centerstone resources, or moving forward with an Exceptional Education evaluation. The Support Team ensures a holistic and individualized approach to address the unique needs of the student, fostering a supportive environment for their academic and behavioral success.

Building Relationships: LEAD Southeast Elementary School will prioritize building strong relationships with students and families as the cornerstone of our educational approach. We embrace inclusivity and view students through multiple lenses to create a healthy school culture. Recognizing the profound impact of relationships, we believe that fostering robust connections is crucial for successful classrooms. Our commitment to understanding and supporting students extends beyond academics, creating an environment where everyone feels valued and respected.

Family Engagement: Ensuring student presence, active participation, and daily engagement in class are vital for effective learning. High out-of-school suspension rates and low attendance rates pose significant challenges to student success, particularly for our special populations. Overcoming these barriers involves more than mere inclusion; it requires fostering a strong partnership between the school and home. This collaborative effort is nurtured through school events and continuous communication, building a robust student culture rooted in the active involvement of both school and family. Our counselors and family and community engagement coordinators also partner in doing home visits (wellness checks) to ensure that we are able to build deeper relationships, assess and evaluate home dynamics that may be impacting instruction, and offer real-time interventions to ensure meaningful engagement in student success.

Trauma-Informed Practices: LEAD Southeast Elementary will prioritize creating a safe and supportive school environment by recognizing the prevalence of trauma and implementing trauma-informed strategies. This approach means looking through a lens of, “What happened to this student and how is it impacting behavior?” as opposed to, “What is wrong with this student?” LEAD integrates trauma awareness, knowledge, and skills into our school culture, practices, and policies, offering wraparound services to support the recovery and resiliency of the school community. Understanding the broad influence of trauma, LEAD staff learn to identify signs, reduce triggers, and implement trauma-informed practices to create safe and empathetic spaces. This approach emphasizes safety, trust, choice, and collaboration, fostering a culture of empathy and understanding.

LEAD Southeast Elementary will promote a structured learning environment and positive relationships, and will equip educators with tools to teach emotional management. Safe spaces will be provided for students to decompress and regulate emotions. We acknowledge that LEAD Southeast Elementary will be working with young elementary students who are still learning regulation skills and may need an adult to facilitate co-regulation. We will offer the support of counselors and student support coordinators who are available to push into classrooms and assist with co-regulation. Students will also be able to utilize the BeWell room for support with regulation outside of the classroom environment. LEAD Southeast Elementary will be dedicated to creating a nurturing environment that prioritizes students' well-being and growth. Staff will use language that is respectful and sensitive to students' experiences and provide options for students to express themselves in non-verbal ways when needed. Trauma-informed practices include:

- **Choice:** Providing individuals with options and empowering them to make decisions within safe boundaries, fostering a sense of autonomy and control.
- **Predictability:** Establishing routines and clear expectations to create a structured and predictable environment, reducing uncertainty, and promoting a sense of stability.
- **Safe Spaces:** Designating areas where individuals can retreat to decompress and regulate emotions, providing a physically and emotionally secure environment for self-care.
- **Regulation Strategies:** Implementing techniques and activities to help individuals regulate their emotions and manage stress, promoting a sense of emotional well-being.
- **Staff Regulation:** Equipping staff with tools and strategies to regulate their own emotions, ensuring a supportive and empathetic response to individuals' needs.
- **Trauma-Informed Safety Plans:** Developing personalized safety plans that consider individuals' specific needs and triggers, ensuring a proactive and supportive response to potential distress.

Crew: At LEAD Southeast Elementary, we will prioritize Crew, a time where students intentionally build social and emotional skills, while embedding relationship and community building, joyful opportunities for exploration and independence, and school and individual pride in the daily culture. Crew serves as a daily community gathering, designed to cultivate joyous and formative experiences while fostering connectedness and building social-emotional skills. Each morning students participate in lessons developed by the school counselors that focus on personal and social development, school belonging, organization, study habits, and processing world events. The positive culture built during Crew gatherings permeates throughout the entire school day. Anchored by our Ethos, LEAD's culture complements the development of intrapersonal skills, emphasizing personal growth, accountability, and contribution to a broader collective.

At LEAD Southeast Elementary, social and emotional learning (SEL) will hold significant value as a means for students to develop the social, personal, and cultural capacities necessary for success in college and life. The SEL lessons taught during Crew seamlessly integrate into all educational curricula and environments, providing students with multiple opportunities to practice these essential skills. This proactive approach not only supports academic achievement but also contributes to a positive school climate, reducing behavioral issues and enhancing overall mental health. The holistic integration of Crew and SEL underscores LEAD's commitment to nurturing well-rounded individuals prepared for the challenges of the future. Crew lesson example include:

- **Strengths Identification:** Activities where students identify their strengths and how these strengths can be utilized in different situations. This boosts confidence and self-awareness.
- **Role-Playing Scenarios:** Students engage in role-playing scenarios that involve decision-making processes. This helps them understand personal responsibility and consequences of actions.
- **Service-Learning Projects:** Students engage in community service or projects that require them to take ownership and responsibility for their roles and contributions.
- **Collaborative Learning:** Students work on group projects that emphasize teamwork, communication, and shared responsibility to achieve common goals.
- **Conflict Resolution:** Students learn and practice conflict resolution skills – emphasizing active listening, empathy, and non-violent communication – to help students navigate interpersonal conflicts responsibly.

BeWell: BeWell in School is a science-backed mindfulness program empowering elementary students to regulate their emotional needs and create a positive and nurturing educational experience for all. Staff and students at LEAD Southeast Elementary will engage in movement, mindfulness, and breathing techniques to foster a sense of balance and well-being. By helping students develop strategies to regulate their emotions, the BeWell Program supports more time on task, fewer discipline referrals, and enhanced academic performance. Students will have the option to request a visit to our designated BeWell Room, where they can receive 1:1 regulation support from our dedicated BeWell Support Coordinator. In making mindfulness concepts more inclusive, BeWell helps build connection and belonging for the entire school community. Specific elements include:

- **Mindfulness Techniques:** Deep breathing and guided meditation help students regulate emotions and manage stress.
- **Emotion Regulation Activities:** Engage students in activities that promote emotional regulation, such as creating emotion wheels, practicing emotional check-ins, or using tools like mood journals to identify and manage feelings.
- **Reflection and Journaling:** Encourage regular self-reflection through journaling prompts or reflective activities. This helps students understand their emotions, strengths, weaknesses, and motivations.
- **Empathy Development:** Promote empathy through exercises that encourage students to consider different perspectives, fostering greater self-awareness of their impact on others.

Restorative Practices: Restorative practices in schools prioritize relationship-building and accountability over punitive measures. They involve open communication, empathy, and dialogue to address conflicts and misconduct. By focusing on repairing harm and promoting understanding, these practices contribute to a more harmonious and cooperative school community, fostering a conducive atmosphere for learning and personal growth. In alignment with our LEAD Ethos, our mission is to instill resilience in our students when mistakes occur. Recognizing that perfection is not expected from our young learners, we commit to employing restorative practices to guide our response in addressing conflicts or harm.

Student Surveys: Student feedback is a critical tool in assessing progress and informing changes to our school culture. The LEAD Student Survey is administered two times per year and is used by school leadership, grade-level teams and network leadership to track our progress towards student culture goals. This two-part survey consists of both a student needs assessment and a 21-question (20 Likert questions and one open-ended question) survey focused on school culture. The needs assessment portion is viewed only by school counselors and used to respond to needs of specific students such as food insecurity and home safety concerns, as well as to identify trending counseling needs that could be addressed in small group counseling, individual counseling, or classroom guidance. The student survey data is compared between schools, across timeframes and within specific student demographics, all in a dynamic report shared with the full school and network teams. In the fall 2022 administration of the school survey, the primary takeaway was the strong relationships students have built with other adults. Specifically, a significant proportion of students reported having an adult in the school they could trust and reported that their teachers believed in them.

SNAP Process: Finally, an important tool to proactively address both attendance and behavior issues is our LEAD MTSS/SNAP framework, which has been fully adopted this year. We use this process to identify and intervene with students who are at risk for attendance, behavior, and/or grades. Prioritized areas for us include attendance (via attendance team interventions) and behavior (interventions come from the school leadership team, the student support team, grade-level teams, and individual teachers). Data is reviewed as a whole school in the middle of each quarter with checkpoints on a regular basis throughout the 9-week intervention cycle.

- c. 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.

The process of creating, implementing, and sustaining a positive culture for students, teachers, administrators, and parents is a multifaceted effort that begins well before the first day of school. This inclusive approach encompasses tailored engagement events for different stakeholders.

For Families and Students:

Family Commitment Meetings: Every new family has a meeting with a staff member to discuss what it means for students, families, and staff to exemplify the LEAD Ethos and to join our LEAD community. During this meeting, staff explain key components of our school culture programming: DeansList merits and reminders, Crew, school counseling program, discipline policy, and the “joy calendar” which highlights school-wide and grade-specific events that are in addition to the positive momentum that happens daily in classrooms. These meetings serve as foundational to ensuring an open line of communication and an immediate relationship grounded in establishing goals for student and family success.

“Popsicle Pop-Ups”: Informal neighborhood gatherings where staff members bring popsicles and begin forging relationships with students and families to help lay the foundation of an inclusive and loving learning environment.

“Taking the LEAD” Celebratory Events - Hosted for new families in March/April and May/June, this event celebrates their decision to join the LEAD community. During this event, families meet staff members, receive welcome packets and readiness kits, and receive tours of the school. This event is specifically designed to create an intimate environment for families to ask questions about “a day in the life” of a LEAD student.

Back-to-School Bash: An end-of-summer celebration at the school for students and families to mingle with staff and set a positive tone for the upcoming year. This is also an important opportunity to build community, allowing new to LEAD families to build relationships with currently enrolled families as they embark on their LEAD journey.

Panels: A panel of parents and students from the community present to school staff with the goal of informing staff about the community and what parents are hoping for their child’s education within our school.

From the First Day of School, Students and Families Experience:

LEADership Academy: The initial five days of school are designated as LEADership Academy. Throughout this period, students delve into various topics crucial to the school's culture. Lessons delivered during LEADership Academy comprise approximately 30% direct instruction and 70% practical application. We firmly believe that these initial days play a pivotal role in providing students with numerous opportunities to familiarize themselves with our cultural expectations. This occurs at a time when all students are more at ease adjusting to a new learning environment. The culmination of the LEADership Academy is marked by a community gathering, to which parents are also invited. A non-exhaustive list of topics covered during these four days is provided below:

- The LEAD Ethos
- Behavior expectations and rules across all school spaces (e.g., classroom, hallways, cafeteria)
- Organization expectations: homework folders, classroom materials, etc.
- Classroom Engagement Practices (e.g, active listening, safe hands, asking for help)
- Emergency drill expectations
- Shout outs and school chants
- “Joy Calendar”- Related Arts Showcase, Hispanic Heritage Month, spirit weeks, etc.
- School-wide token economy and how to earn merits and use points

Family LEADership Academy: A one-hour opportunity on the first day of school for our families to learn about what their student’s LEADership Academy schedule entails and to hear an overview of the content. Families are encouraged to attend the first community gathering that happens at the conclusion of students’ LEADership Academy experience.

For Teachers and Administrators and Staff:

In-depth Hiring Process: The hiring process provides candidates with a firsthand experience of schoolwide expectations, involving scenarios, a sample teaching session, and observations. Attracting staff who are mission-aligned and committed to serving every student is a core component of our All Means All emphasis, which has been used to redesign our hiring process. This approach enables candidates to evaluate their

alignment with LEAD's expectations and offers opportunities for them to showcase their compatibility with the hiring teams.

LEAD University: All staff participate in LEAD University, our network professional development series that addresses educational priorities that are consistent across all of our schools. This professional development includes training on cultural humility, what we believe about students and families and how that informs our approach in all school settings, and our role in creating a community of joyfully invested learners.

Curriculum Institute or Student Support Institute: All staff participate in role-specific professional development tailored to their responsibilities within the school. This professional development involves conversations about sustaining high expectations for all learners and effectively employing key instructional and/or trauma-informed strategies to support the diverse needs of every learner.

Staff Crew: Staff Crew mirrors the structures used in student Crew. Staff members experience a model of Crew best practices, gaining proficiency in conversation management techniques such as paraphrasing, summarizing, linking, and blocking. Staff become part of a smaller community within the larger school setting, fostering close relationships and a group identity related to their Crew. Recognizing the significance of these collegial relationships, we understand their crucial role in strengthening staff culture, directly influencing the students' experience in our school. Staff Crew time is utilized to introduce and practice conversations that may be challenging to facilitate with students. For instance, not every staff member may feel comfortable responding when a student shares a story about a traumatic experience in Crew. This practice is essential in preparing our staff to effectively guide students through a developmentally appropriate social-emotional learning curriculum.

Walkthroughs and Coaching: The principal, assistant principals, and instructional managers will observe teachers using a rubric rooted in instructional anchor techniques that address classroom management and environmental expectations. From the first day of school, teachers will receive live coaching as needed. The quantifiable data from the walkthrough rubric will be used to identify teachers who need to attend targeted coaching clinics.

Feedback: All feedback conversations are anchored in our Ethos and values, which underpin the health of our school culture. All staff will receive ongoing feedback including strengths and areas of growth.

Data Analysis: To ensure that our teachers are not only aware of how our students are progressing academically, but also remain attuned to each child's educational journey, teachers and other school staff routinely analyze DeansList data. This analysis includes deep dives into subgroup data, positive-to-negative point ratios, communication with families, the nature of referrals made for students, and attendance records.

Throughout the school year, LEAD Southeast Elementary staff will be dedicated to engaging families in the school culture. Central to this commitment is the consistent and purposeful communication maintained with students' families, serving as a cornerstone of the school's identity. It is crucial that students and their families perceive themselves as integral members of a caring community, eager to collaborate in the task of preparing for college and life.

Recognizing the significance of keeping families informed, our commitment extends to providing regular updates on students' progress, encompassing both academic achievements and behavioral developments. Every family will be ensured a minimum of weekly communication from the school. Additionally, monthly events will be hosted at the school, encouraging families to participate and even take on leadership roles when possible. Quarterly celebrations will be held to praise academic accomplishments and personal growth, aligning with and exemplifying our Ethos.

In fostering a strong partnership, we will invite families to actively engage by committing to attend at least one evening or daytime event per semester, further enriching the vibrant school community we collectively nurture.

Families will also have access to ongoing school culture engagement opportunities. Families will be able to access daily reports on their child's merits and reminders through the DeansList App, observe in their student's classroom, and meet with administrators upon request. Each week, families will receive hard copies of DeansList Progress Reports, accompanied by SMS text messages with clickable links to view the reports. Academic progress data is included in this report every other week. Additionally, communication will occur through closed Facebook Groups, extending the school community to provide families with access to other LEAD families, faculty, and staff.

Monthly and quarterly events further enrich family engagement, featuring activities such as the Shirt Ceremony, Hispanic Heritage Month Celebration, Bullying Prevention Programming, Quarterly Academic Recognition Ceremony, student-led conferences, Black History Month Celebration, Related Arts Showcase and Multicultural Potluck, Promotion Ceremonies, Kindergarten Sneak Peeks, and Senior Signing Day (a network-wide event).

LEAD Southeast Elementary School will maintain an open enrollment policy, welcoming new students throughout the academic year, contingent on available space. Ensuring a seamless integration for these students is pivotal, and this begins with establishing a robust and consistent school culture that serves as a foundation for understanding and embodying our expectations. Our comprehensive cultural programming and clear expectations play a key role in achieving this objective.

In addition to fostering a strong cultural environment, we prioritize providing essential resources for new students. Upon enrollment, these students engage in one-on-one sessions with counselors to thoroughly review school expectations. To aid in their orientation, they receive an onboarding packet, a comprehensive guide serving as a convenient reference. This packet covers crucial information related to tech access, uniform guidelines, school expectations, attendance policies, LEAD Ethos, merit system (rewards, joy and shout outs), progress reports and report cards, details about CREW and BeWell, links to important websites, and introductions to key adults within the school, including the leadership team and administration.

Recognizing the importance of ongoing support, new students benefit from regular check-ins with a counselor or other staff member. To facilitate a smooth and positive transition into the school community and provide a platform for addressing any concerns, all new students will engage in a 2x10 intervention, ensuring

personalized support through two minutes of daily check-ins for 10 consecutive days. We actively assist new students in forming connections by organizing lunch groups and buddy systems, fostering an inclusive and supportive community environment.

- d. 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.

In all LEAD schools, every student is approached with an asset-based perspective, highlighting their belonging in the community. The focus is on fostering habits that enable all students to self-identify as learners. For students with disabilities, our commitment involves implementing tailored accommodations, personalized support plans, and accessible resources to ensure equitable participation in all aspects of school life. Individual Growth Goals (IGG) are set for major assessments for each student and differ based on the assessments that most appropriately reflect growth for that particular student. For instance, if it's more suitable, students with low-incidence disabilities might have an IGG in math using Fastbridge rather than MAP. Specialized training for teachers and staff is prioritized to enhance their ability to address diverse learning needs. English learners are embraced through targeted language support programs, language acquisition resources, and a welcoming environment that values linguistic diversity. We foster an inclusive atmosphere that celebrates various cultures, promoting an appreciation for multilingualism. To support students at risk of academic challenges or dropping out, proactive intervention strategies are employed. This includes early identification, personalized academic support plans, and mentorship programs to provide individualized guidance.

Collaborative efforts between teachers, counselors, and parents are integral to creating a comprehensive support network. Regular professional development opportunities for educators focus on best practices for accommodating diverse learning needs, fostering an environment where every student feels valued and has the opportunity to thrive. The school culture is reinforced by the principles of equity, ensuring that each student, regardless of their background or challenges, is afforded the resources and encouragement needed for academic success and personal growth. Regular assessments and feedback tools are in place to continually refine and improve our approach, fostering an inclusive and supportive community for all.

- e. Provide the student discipline policy as Attachment E (if not already included in Attachment D of the school handbook).

In order to facilitate a strong culture across our network of schools and to set consistent expectations for families who choose to enroll their students in multiple schools across the district, we have chosen to follow the MNPS Discipline Tables across our network. Additional student behavior expectations are found in our school handbook.

- f. 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 non- discretionary)

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.

To promote positive behavior, LEAD uses DeansList software to manage the tracking, communication, and analysis of our Positive Behavior Intervention Systems. In DeansList, as well as verbally in class, teachers issue "merits" for positive behaviors and "reminders" for behaviors that detract from a positive learning environment. The expectation is that every child has an average of 5 merits:1 reminder each week. The merits that students earn accumulate and can be used in a variety of ways: visits to the school store, classroom incentives, school raffles, or even as data to show readiness for school leadership positions like becoming a student ambassador, a teacher's helper, or a cafeteria/recess monitor.

DeansList data is analyzed regularly by the school principal and culture leader. It is also used in coaching conversations with teachers. There is professional development time designated for DeansList data analysis where teachers are asked to reflect and set goals to increase positive engagement with students and families. Moreover, teachers and support staff regularly engage in discussions with their managers about fidelity of using the system, frequency of contacting families, how they are delivering positive and constructive feedback to students, and their positive to negative ratio broken down by subgroup.

Our Discipline Tables define the following: A list and definition of the offenses for which students in the school must (where non-discretionary) 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. The only thing that differs for LEAD is that our expulsion appeals go to our LEAD Board of Directors via a letter the family writes to the principal.

If a student who has an Individualized Education Program (IEP) violates school rules or district policies outlined in this handbook, he or she will be disciplined in accordance with district policy and state and federal laws that govern special education, such as the Individuals with Disabilities Education Act (IDEA). If a student is suspended for an accumulated 10 days, the student's Individualized Educational Program team (IEP team) will convene to determine if the behavior displayed is a manifestation of the student's disability.

The following team members are responsible for carrying out the school's discipline policy:

- The principal will be the administrator responsible for carrying out the school's discipline policies until the school's enrollment is greater than 200, at which point an assistant principal of students (APS) will become the primary manager of school discipline. The APS will continue to partner with the principal,

as well as other key stakeholders (counselors, student support coordinators), when making higher level disciplinary decisions. The principal also sets the cultural mission and vision and helps manage and implement the vision across the school, as well as crafts data-driven outcome goals for the academic year.

- The APS manages the implementation and maintenance of school culture initiatives designed to support the achievement of the school's outcome goals. They manage the student support team and collaborate with Grade Level Chairs and teachers to ensure that school cultural practices drive student growth and achievement. They track progress toward outcome goals using quantitative and qualitative data and deliver progress data and feedback to staff regularly. They consistently examine school culture data to determine actions required to best support students and staff.
- Student support coordinators enforce the maintenance of high cultural expectations to protect the learning environment for ALL students. They coach students and families through their navigation of our school behavioral systems and facilitate restorative conversations between students and teachers. They analyze student behavior data and plan responsive services accordingly and anticipate student behavior needs and proactively address them.
- Counselors promote and enhance student achievement through the delivery of short-term and long-term interventions tied to standards in academic, career, and personal/social development.
- Grade-level chairs facilitate grade-level culture systems. They serve as advocates for student support at their grade level.
- Teachers and staff enforce school-wide behavior systems by maintaining high and consistent expectations for ALL students ALL the time. They reach out directly to student support team members with questions about consequences and interventions.

Students, parents, and families will be informed of discipline policies in the following ways:

- Families learn an overview of our disciplinary policies during a commitment meeting that happens in their preferred language: English, Spanish, or Arabic. During this commitment meeting, expectations for students, families, and school staff are outlined and families learn primarily about disciplinary philosophy and approach. Common infractions and the consequences that correspond are also discussed. For families who speak a language outside of our three most commonly spoken languages, best efforts will be made to use an interpretation service to review the content in their native language.
- For families who want to review the discipline policy in full, it will be available online in our three primary languages: English, Spanish, and Arabic. Additionally, hard copies of the discipline tables, which define specific behavior violations and possible consequences will be available in our main office for families who request to read it and they will be referenced in meetings pertaining to higher level disciplinary responses: ISS, OSS, expulsion.
- School expectations and consequences will be taught to students during LEADership Academy, which runs five days in the beginning of the year. During this time, the days are steeped in cultural onboarding and students will primarily learn about the most common behavior infractions and possible consequences that accompany those infractions. This content is part of the new-student-onboarding curriculum that is used to acculturate students who join our school after LEADership Academy has concluded. New student onboarding is led in partnership by our school counselors, the family and

community engagement coordinator, and eventually our upperclassmen as we matriculate fourth and fifth graders.

Section 1.9 - Recruitment and Enrollment

In this section:

- a. Provide as Attachment F 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 Tenn. Code Ann. § 49-13-107;
 - Any proposed articulation agreements, pursuant to Tenn. Code Ann. § 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.
- b. Describe how parents and other members of the community will be informed about the proposed school.

LEAD Public Schools has a proven track record of reaching out to the Nashville community and recruiting a diverse student body across schools within our network. In addition, our director of enrollment brings over a decade of experience in student recruitment in the Nashville charter school community, including multiple years of experience working at the elementary level. With his expertise, we plan to utilize our strengths as a network in recruiting students, but tailoring our strategy specifically to the elementary grades.

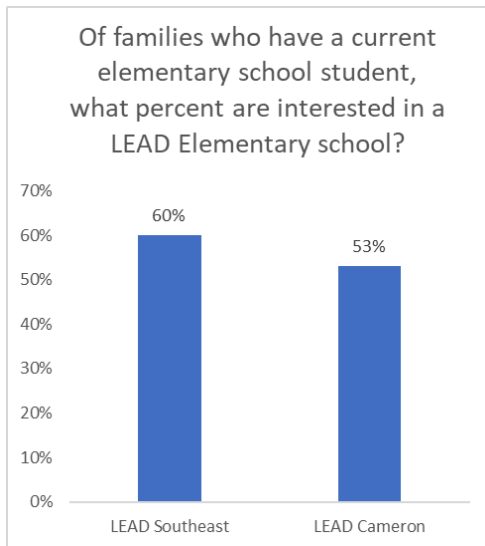
Our initial outreach activities include canvassing a target neighborhood; conducting a neighborhood needs assessment; working with the Neighborhood Resource Center and Family Resource Center to conduct research; attending neighborhood meetings with neighborhood nonprofits and community-based organizations; and holding informational sessions for prospective parents and families. We will also leverage our current community partners to gain exposure to their students for the purpose of both engaging with families and spreading the word about LEAD Southeast Elementary.

A key facet of our LEAD Public Schools recruitment process is community canvassing in the following apartment complexes - Thompson Place Apartments, Stoneridge Apartments, Blue Note Apartments, and Mosaic Apartments. As previously mentioned, we conducted 405 conversations with families throughout the identified geographic priority zones for LEAD Southeast Elementary, and more than 75 of those had students in elementary grades that voiced a desire to see LEAD operate those grades if offered.

Throughout the application process, we have conducted a number of community engagements that have provided valuable information about demand for LEAD Public Schools to operate elementary grades in LEAD Southeast Elementary. These activities include a mailer, community canvassing efforts, parent meetings, radio ads, and a targeted social media campaign for the zip codes (37013, 37211, 37211, 37217) that are within the LEAD Southeast geographic priority zone.

Through these efforts, we have sourced 32 additional elementary aged families that have voiced an intent to apply to LEAD Southeast Elementary in the month since submitting our initial application. These efforts will continue as a part of our year-round recruitment efforts.

Family Interest Survey



LEAD Southeast Elementary will continue to employ a dedicated full-time FACE (family and community engagement) coordinator, as well as rely on our network FACE support team. The FACE team has deep connections in our communities and speaks a range of languages including Spanish and Arabic. With these expanded recruitment resources, we are staffed to be able to additionally canvas, recruit, and host community events to increase awareness about LEAD Southeast Elementary. We feel confident that the school, its mission, and expectations will not only be accepted by the community but also actively supported. Formal outreach efforts will commence upon formal acceptance of this charter proposal.

In addition to communication with prospective families, we will inform our existing stakeholders. Upon charter approval, LEAD will announce the approval of the school to our current LEAD Southeast Middle and High School families and community partners. Communication will be delivered in multiple languages and through multiple channels, including written letters, phone calls, and text messages. We will host a series of in-person meetings open to all parents and families of current and future students at our existing LEAD Southeast Middle and High School campus. A best practice that we have been able to leverage throughout our network is our sibling outreach program and referral campaign. Upon charter approval, our family engagement team will leverage our current families to successfully host a referral campaign to cultivate leads and applications to LEAD Southeast Elementary. These leads will serve as the starting point for our outreach efforts in not only sourcing applications, but also informing our outreach strategy as we engage our larger community.

- c. Describe how you are assessing the demand for your school. Include data and factors, including methodology and calculations used to determine projected enrollment and needs within the community.

For the 2023-24 school year, our family engagement team from LEAD Southeast Middle and High School knocked on more than 1,350 doors and held more than 820 conversations with families about their enrollment intentions. Through these efforts, we not only learned of interest in LEAD Southeast elementary evidenced in our sourcing more than 440 leads, but also were able to successfully enroll more than 125 new students.

One in six conversations included mention of elementary grades that we do not currently offer, but serve as data to inform our desire to have an elementary option for our families. In addition, we have consistently been able to enroll 35-55% of our 5th grade class with younger siblings as a enrollment pipeline to LEAD Southeast Middle. This consistent demand coming from the elementary grades coupled with the increased enrollment in the cluster evidenced a need for more high-quality options and an option at LEAD for a K-12 pipeline.

Moreover, families in this area have shown a desire for selecting optional schools, as evidenced by both strong enrollment and waitlists at other local charter schools. This points to a willingness of families to research their options and make an active choice of a school that best fits their students' needs.

- d. 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.

LEAD Public Schools will be able to draw from our past experiences with successfully recruiting diverse communities through the following initial outreach activities:

- **Community Engagement** - Our network family engagement team has identified primary and secondary geographic priority zones that we will target upon being approved. Immediately upon charter approval, we will collaborate with identified apartment complexes to canvassing, door-knock, and host events.
- **Community and Family Needs Assessment** - Our family engagement team will work collaboratively with our LEAD Southeast Elementary school counselors, our Family LEADership Team, and community partners to conduct a neighborhood needs assessment. We will then align our community engagement strategy to this needs assessment to ensure efficiency and response to community needs.
- **Work with the Neighborhood Resource Center and Family Resource Center** to conduct research.
- **Community Partnerships** - Our family engagement team along with the identified school leader will attend meetings with neighborhood nonprofits and community-based organizations. After consulting with these partners, school leadership will seek opportunities to collaborate on community programming that will provide access to the community and families to build the brand and community awareness about LEAD Southeast Elementary.
- **Family Engagement** - We will hold a series of focus group sessions for prospective parents and families.

As we have seen strong community support for LEAD Southeast Middle and High School, we fully anticipate that LEAD Southeast Elementary School, its mission, and expectations will also not only be accepted by the community but also actively supported. Formal outreach efforts will commence upon formal acceptance of this charter proposal by the Metro Nashville Board of Education.

LEAD Southeast Elementary School will undertake similar recruitment efforts as other schools across the LEAD network. LEAD believes in demonstrating to our families and students that their presence at LEAD is not only

important, but also a choice. We have found that when parents are engaged early in the process and students are told what to expect at the school, the investment is much greater than if we simply wait for students and/or families to show up. Prospective students are recruited at local schools using flyers and presentations, as well as at parent events and parent association meetings. The principal and staff will meet students and parents at information meetings, orientation meetings, and an open house prior to the opening of school.

LEAD will seek to achieve a racial/ethnic balance reflective of our Nashville communities. LEAD will be open to any student and parent in Davidson County who meets the eligibility requirements as defined under Tennessee Code Annotated § 49-13-113. Recruitment efforts will be aimed primarily at the communities near the school location, but there will be no geographical boundaries or restrictions on applications. At all times, LEAD will comply with state regulations and recruit and enroll students from the target population. We will take the following steps to ensure that students representative of each school's respective communities continue to be recruited:

- Visit local preschools and organizations in each neighborhood; host a meet-and-greet lunch with school counselors and church leaders;
- Nashville is host to seven head start centers, many of which we have already established relationships with to host recruitment events, graduations parties, school visits, and informational sessions to source elementary applicants. Key events such as Dr. Seuss Day, Elementary School Choice Fairs, and Community Days are events that we will leverage as opportunities to not only build brand awareness, but also provide information about LEAD to potential applicants;
- Partnering with families to host birthday parties and home visits to have at-home informational sessions;
- Engage in community canvassing and conduct home visits and explain to prospective students and their families the purpose of LEAD;
- Conduct parental information sessions to elaborate on the commitment involved with attending LEAD;
- Leverage social media and other communications platforms (radio, print media) for targeting messaging and branding;
- Place advertisements in local newspapers and community association newsletters;
- Utilize business canvassing and engagement strategies (post flyers and notices in local supermarkets, churches, community centers, and apartment complexes); and
- Distribute promotional materials such as water bottles, t-shirts, and pencils at all recruiting events and meetings.

LEAD is also proud of the fact that each of its schools choose to participate in Metro Nashville Public Schools Optional School process, the universal optional schools process for students in Davidson County. LEAD Southeast Elementary School will participate in this process as well. Admission to LEAD will be a cooperative decision between students, parents, and teachers.

- e. Describe in detail the recruitment and marketing strategies that will be used, the timelines for implementing

these strategies, and who will be responsible for implementing these strategies?

- **Social Media Recruitment Campaign** - Upon being approved, LEAD will conduct a social media campaign like it has at our other LEAD campuses to generate leads, build brand awareness, and source applications through targeted messaging based on zip codes within our geographic priority zones. In partnership with our director of communications, our director of enrollment and family engagement will partner to target specific communities with targeted messaging.
- **Canvassing and Community Engagement** - LEAD currently has a year-round recruitment cycle that is led by our family and community engagement coordinator (FACE) and complemented by our network engagement team. These efforts will include community event attendance, event partnerships with key apartment complexes, and partnerships with area Pre-K and Head Start Centers. Tabling engagements will also be hosted at local grocery stores, barber shops and hair salons, sports league events, and community centers. Goals for these efforts include applications, number of doors knocked on, conversations held, leads generated, tours scheduled, and successful referrals.
- **Rolling Tours** - Twice a week, we will offer tours on campus for families to be able to come and meet with campus faculty and staff and learn more about LEAD Public Schools.
- **Open Houses** - Once a month, LEAD Southeast Elementary will host an open house where applicants, leads, and other interested community members can attend to learn more about LEAD Public Schools.
- **Community Center Partnerships** - A key partnership during the peak recruitment months is with community centers to collaborate on summer camps and events for building community, and also recruiting families to LEAD. Our family and community engagement coordinator collaboratively with our network engagement team will have a regular presence to ensure consistent attendance and information for recruitment efforts. For LEAD Southeast Elementary, Coleman Park Community Center, Antioch Community Center, and Southeast Community Center are key community partners that we will continue to partner with and leverage to support our LEAD Southeast Elementary recruitment efforts.
- **Head Start Center Outreach and Engagement** - Susan Gray Head Start (445 Cotton Lane) is within the LEAD Southeast geographic priority zone and will be a target of our recruitment efforts. We will host quarterly informational sessions and partner on offered events to provide information about LEAD Southeast Elementary to attending families.
- **Referral Campaigns** - As previously mentioned in our application, we source more than 30% of our 5th graders from younger siblings. These efforts are the result of sibling outreach and engagement that we will continue to leverage best practices to source additional applicants for younger grades. Initiatives include sibling nights at athletic events, special sibling events, and intentional outreach and home visits to referrals to generate leads and applications.

f. 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.

LEAD will be open to any student and parent in Davidson County who meets the eligibility requirements as defined under Tennessee Code Annotated § 49-13-113. Recruitment efforts will be aimed primarily at the communities near the school location, but there will be no geographical boundaries or restrictions on applications. LEAD will comply with all state and federal regulations regarding nondiscrimination and will not discriminate against any student, parent, employee, or community member on the basis of race, ethnicity, national origin, religion, gender, or disability. LEAD will strictly maintain a nonsectarian approach to all its programs, events, admissions policies, employment practices, and all other operations. LEAD will never charge tuition. LEAD will recruit all students regardless of their socioeconomic, academic, or special need status.

- g. Describe student recruitment after the proposed school has opened. How will it differ from pre-opening recruitment?

See below for question (h).

Question h is required for all sponsors except Category 1 applicants.

- h. Describe student recruitment after the proposed school has opened.
- How will it differ from pre-opening recruitment?
 - Please identify how this will differ from current enrollment strategies.

After LEAD Southeast Elementary has opened, student recruitment will undergo a shift in focus and strategy compared to the pre-opening phase. While pre-opening recruitment typically centers on generating interest, awareness, and securing commitments from prospective families, post-opening recruitment aims to sustain and grow enrollment. The emphasis will shift towards retaining current students, fostering positive experiences, and leveraging the reputation and successes of the school to attract new enrollees.

Our manager of family engagement and customer experience specifically manages our retention efforts. Once school opens, our manager of family engagement and customer experience will shift the focus of the family and community engagement coordinators to fostering an engaging customer experience that yields greater than 85% retention in our current student enrollment. Our director of enrollment and family engagement will continue our year round recruitment efforts collaboratively with our network engagement team which is currently composed of three family engagement associates. Differences in post-opening recruitment strategies include:

- **Retention Focus:** Rather than solely concentrating on attracting new students, post-opening recruitment prioritizes retaining the current student body. Building a strong school community, addressing any concerns promptly, and continually enhancing educational offerings contribute to student and family satisfaction, fostering retention.

- **Word of Mouth and Reputation:** With LEAD Southeast Elementary in operation, there is an opportunity to leverage positive experiences and academic achievements to enhance the school's reputation. Word of mouth becomes a powerful tool as satisfied families share their experiences with others in the community, influencing potential enrollees.
- **Family Engagement:** Monthly, our family and community engagement coordinator works collaboratively with the manager of family engagement and customer experience to track engagement activities against the following Key Performance Indicators:
 - **Successfully vs. Meaningfully Engagement** - We have a goal to successfully engage (one engagement) 80% of families and meaningfully engage (3 engagements or more) 60% of our families.
 - **Sentiment Score/Customer Satisfaction Rate** - Each of our schools have a goal to have greater than 90% satisfaction from its families that participate in our family surveys evaluating our offered services and school operations.
 - **Cumulative Response Rate** - In order to ensure that we are not subject to survey bias, we have a 50% or greater cumulative response rate goal for our current enrollment in our family surveys that are offered bi-weekly.
- **Year-Round Recruitment** - Once the school year begins, these efforts will shift to being led by the network engagement team to ensure that we are able to both continue recruiting, but also have efforts internally to retain families that have already chosen LEAD. We are already staffed to ensure that engagements are happening to impact recruitment and retention all year long.
- **Community Engagement:** Post-opening, the school can deepen its engagement with the local community. Establishing partnerships, participating in community events, and showcasing the school's positive impact contribute to a favorable public image and attract families seeking a supportive educational environment.
- **Performance Track Record:** The school's performance data, including academic achievements, extracurricular successes, and any unique features, becomes a crucial component of recruitment. Sharing tangible evidence of the school's success contributes to attracting families looking for high-quality education.
- **Adjustments Based on Feedback:** Post-opening, recruitment strategies can be fine-tuned based on feedback from the initial cohort of students and families. Adapting to the needs and preferences of the community ensures ongoing relevance and attractiveness to prospective enrollees.

Overall, post-opening recruitment is a nuanced and adaptive process that builds on the foundation laid during pre-opening efforts. It shifts from creating awareness to showcasing the school's achievements and creating a positive environment that fosters retention and attracts new students organically.

Section 1.10 - Parent and Community Engagement and Support

In this section:

- a. What feedback regarding the startup of the school has been provided by the community – including parents interested in enrolling their student(s) in your school, and how has this feedback been incorporated into this application? Provide a detailed explanation of how the feedback was collected, and a strong rationale for the validity of responses.

Over the course of this application-writing period, LEAD Public Schools has hosted a series of parent meetings and forums at LEAD Southeast Middle and High School, LEAD Cameron Middle, and LEAD Brick Church during which we have had conversations about the prospect of a LEAD elementary school. The impetus for this was not only our interest in having a K-12 continuum, but also our partnership with other local optional schools that were interested in partnering with us for elementary enrollment. The support for these applications is widespread among parents, alumni, supporters, and other constituents.

While engaging in our recruitment and community engagement efforts, our family engagement coordinator and network engagement team not only gathers information from potential middle and high school families, but makes notes internally about families interested in elementary. Since we have partnerships with MNPS schools and other optional schools, this interest has been directed to neighboring options as a part of our family engagement efforts. Knowing that this is a common practice, our family engagement team has often spoken of the need for an elementary school and have informally had conversations with families about the possibility of a LEAD elementary school at various events.

As a part of our application process, we conducted several engagement events to source letters of support from our LEAD Community. Attached to this application are letters representing the following experiences - LEAD Public Schools staff members that currently have students enrolled in both LEAD Cameron Middle and LEAD Southeast Middle and High School, currently enrolled families of LEAD Cameron Middle and LEAD Southeast Middle and High School, and prospective and new applicants to LEAD Cameron Elementary and LEAD Southeast Elementary. Evidenced in these letters is not only a positive experience with LEAD Public Schools, but a vote of confidence and support of our successful approval and eventual operation of elementary schools to provide a K-12 continuum to benefit Nashville families.

- b. Describe how you will engage parents and community members and how this engagement strategy will adjust from the time that the proposed school is approved by this authorizer through the school's opening. What specific strategies would you rely on to establish buy-in from local parents and community members during the pre-opening period?

The months prior to the first day of operation of LEAD Southeast Elementary School will be a critical time to ensure that the school has the support from the community, its families, and its students to ensure a successful launch of the school. As soon as the application is approved, LEAD will begin communicating with its current stakeholders, including current staff, current families, and external partners. In addition, LEAD will hire the dedicated family and engagement coordinator (FACE) to support LEAD Southeast Elementary.

Our LEAD Public Schools' community engagement plan takes a strategic approach to relationships, communication, and interactions between community members and our internal and external stakeholders. These relationships are vital to our ability to collaboratively create a LEAD community that meets students' needs academically, physically, and emotionally to ensure student success.

We have key geographic priority zones in which we conduct ongoing business and apartment complex canvassing and intentionally cultivate relationships with community members that complement our community partnerships. Through these efforts, we have forged relationships with families and office managers that enable us to provide essential services for families like assistance for household essentials, support to students at home, and enhanced our ability to partner in hosting school events in the community. Additionally, we have been able to cultivate meaningful relationships with organizations like Southeast Community Center, Team Smile, Nashville After Zone Alliance (NAZA), the Nations Ministry, Nashville International Center for Empowerment, and Small World Yoga to provide engaging activities for students and families.

Our director of enrollment and family engagement will work collaboratively with our school counselors to do a school needs analysis so that we can leverage these partnerships to include LEAD Southeast Elementary as well to develop additional partnerships to meet needs specific to elementary school. He will spearhead efforts to engage the community in discussions around opportunities at LEAD Southeast Elementary. This dialogue and collaboration ensures that services rendered are aligned to school and community needs, while also enabling us to provide students opportunities for learning by extending our school walls and extending our school day.

At LEAD Southeast Middle and High School, 87% of our parents speak a language other than English at home. We anticipate similar percentages at LEAD Southeast Elementary School. Implementation of DeansList, a tool that allows us to communicate student information including student reports and announcements, has been a key lever in ensuring that we are responsive to the needs of our families, while also solving for language barriers that historically may limit communication between school and diverse communities. This program will be used at LEAD Southeast Elementary, as well. Our network engagement team is composed of Spanish and Arabic speakers that are able to build intentional relationships with families to complement our internal communication tools. Currently, the family and community engagement coordinator at each of our campuses represents the primary demographic of its campus. Knowing that our network is predominantly Spanish speaking, we leverage our full family and community engagement team that has a wealth of experience, language ability, and family dynamics that match those that we target in our recruitment and enrollment efforts.

Family Engagement Support: Differentiating out services

Our elementary community will represent the diversity of the local Nashville community. We recognize that families who are new to the country or speak a home language other than English, may require different support. As a result, our FACE team offers assistance in enhancing their comprehension of U.S. educational policies and accessing available resources within the Nashville community. These services range in scope, based on family need and will include:

- Classes held at the start of the year to explain the importance of daily attendance:

- including when or NOT to send a child when they are experiencing illness
- how good attendance improves academic performance
- If planning an appointment during school hours child needs to attend school before or after the appointment (after school appointments are preferred)
- How to support their child:
 - ways to support with homework
 - developing phonemic awareness (K-2) in native language using rhymes, songs, poems (tools given out in native language)
 - reading strategies to support student growth- explain purpose of decodable/fluency readers
 - math fact fluency expectation per grade level
 - how to read/understand data
 - develop understanding of 3rd/4th grade retention laws starting in Kindergarten
 - Hold trainings to introduce parents to software used to communicate from/with the school
 - Importance of TNReady and how to help their child be successful (3rd, 4th, 5th)
- Healthcare:
 - resources for sliding scale clinics for health, dental, vision
 - create a connection for free glasses
 - dental cleaning coming to campuses
 - vision screening with free glasses vouchers
- Parent English Classes:
 - Weekly classes for parents to learn English
- Behavioral/ Mental Health:
 - Hold classes explaining the school culture, Ethos, and discipline plan
 - Make and take training: how to create a home routine (e.g., bed, homework, morning), how to respond to challenging behavior at home, etc.
 - Resources for community mental health services

- c. Provide, as Attachment G, any of the following: letters of support, including those within the local community, outreach to parents, intents to enroll, or memoranda of understanding, 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.

Note: General letters of support that include generic language such as "this school will provide a high-quality option" or "we will work to support the school once opened" do not satisfy this expectation. Instead, letters of support should demonstrate a clear commitment that is measurable and that is likely to result in enrollment targets being met, demonstrate financial support, or sustainable community engagement.

- d. Outline any community organization, business, or other educational institutions that the proposed school will partner with. Specify the nature, purposes, terms, and scope of services of any such partnerships, including any fee-based or in-kind commitments from community organizations or individuals that will enrich student

learning opportunities.

Every year, our LEAD campuses commit to providing a supportive environment to our students and families. At LEAD Southeast Elementary School, we will continue to prioritize partnering with our students and families in providing a rich and complete academic experience, utilizing the same systems and processes found in other network schools. This year, LEAD adopted new metrics to track families who are “meaningfully engaged” and worked diligently to ensure all our families met this target. In addition to our monthly parent meetings, our campuses host monthly meetings with parent leaders to ensure regular dialogue and alignment around family expectations. Our schools utilize Possip, a platform that allows quick feedback from families, to strengthen the communication channel between school leadership and families by providing bi-weekly family surveys. Upon completion, our family engagement team, collaboratively with school leadership, reaches out to families individually to follow up on all feedback received.

One unique aspect of the LEAD Public Schools model is the staffing of a dedicated, full-time family and community engagement (FACE) coordinator at each school. The FACE is a dedicated resource that works collaboratively with campus leadership in the meaningful and intentional engagement of our parents and families. As a part of their work, our FACES collaborate on the family leadership team, hosting family workshops and soliciting parent feedback through Possip. The FACE ensures that parents and family members, as well as the broader community, have a strong line of communication to and from the school, as well as to ensure that community resources are connected to and utilized by all members of the LEAD community. The school-based FACE is supported by the network family engagement team, which includes multiple student recruiters. This team forms the infrastructure necessary to ensure our robust family and community engagement plans are fully implemented. This is also an area within the organization where we are able to connect with families along cultural lines. Cultural competency is vitally important to ensuring a vibrant LEAD community, and our family and community engagement coordinators are a key collaborator in these efforts.

Our team uses the following definition to guide our work: parent and family engagement means the participation of families in regular, two-way, and meaningful communication involving student academic learning and other school activities, including ensuring:

- Families play an integral role in assisting their child’s learning;
- Families are encouraged to be actively involved in their child’s education at school; and
- Families are full partners in their child’s education and are included, as appropriate, in decision-making and on advisory committees to assist in the education of their child; and other activities are carried out, such as those described in Section 1116 of the ESSA.

Family engagement efforts are aimed to successfully engage the majority of our enrollment through parent teacher conferences, survey completions, attending on and off campus events, volunteering on campus, and providing resources to support our LEAD community. These initiatives ensure that the campus is intentionally building authentic relationships with families that encourage engagement with the school community. In fact, each campus’s family and community engagement coordinator tracks successful engagement with each family, with the goal of each family being successfully engaged 2-3 times a year. Additionally, we have a secondary goal of 60% of our enrollment being meaningfully engaged, which is three or more engagements by the end of

the year.

What has made each of the activities sustainable is family and community engagement being a core component of school culture, as well as setting expectations for school staff to be involved. Throughout the school year, campus leadership teams consistently receive feedback from families through Possip which provides bi-weekly surveys to parents gauging parent satisfaction with LEAD. Our customer experience is essential to our daily operations, and as such, we complement our bi-weekly Possip surveys with a bonus monthly customer experience survey about a specific subject matter (transportation, extracurricular involvement, daily operations, peer tutoring, and academic experience). Two of our key performance indicators are attached to our customer experience: 45% cumulative response rate, and a 2.8/3.0 happiness sentiment score for the year.

LEAD recognizes the need for an inclusive approach to our normed, consistent, and thoughtful two-way communication with families. A key element towards inclusivity includes engaging families who have multiple language needs. LEAD is committed to creating building signage in multiple languages, sending written communication in multiple languages (including translating all student progress reports), and using live interpretation services in direct communication with families.

One of LEAD's most successful engagement initiatives is our student-led conferences (SLCs) which LEAD conducts annually. During these sessions, students communicate their successes and challenges and are able to review their academic progress with family members. Through this engagement, we are able to engage various LEAD stakeholders: community partners, volunteers, and parents. Another pivotal tool that has enhanced family engagement is the implementation of DeansList, a communication platform that allows teachers and families to communicate in a family's home language.

- e. Outline how the proposed school will engage parents and community members prior to the school's opening and throughout the life of the school (in addition to any proposed governance roles).
- f. 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.

LEAD encourages families and students to participate in a range of events to ensure a smooth transition to the LEAD community. All families will be given a copy of the LEAD student handbook upon registering their student at the school. Both new and returning students are encouraged to attend orientation prior to the start of the school year. The purpose of orientation/open house is for families and students to update family and student information, receive information on new or changed school policies and expectations, learn school culture, as well as ask questions and address concerns prior to the start of school. Additionally, annually as a part of our family engagement program, each of our LEAD campuses host its Title 1/School Improvement Plan meeting for the purpose of ensuring that families are made aware of how family and parent involvement are active within the school community. Although we encourage and welcome families to be involved in the life of the school, LEAD does not make any requirements for families to volunteer with their child's school.

Our LEAD Public Schools customer experience journey map outlines key points of engagement so that we can ensure that all LEAD families have a shared LEAD experience. These key engagements include our Back to

School Events/Orientation Days (August/September), Intent to Re-Enroll (December), Application Parties/Open Houses (January/February), Taking the LEAD - New to LEAD Welcome Events (March/April), and Senior Signing Day and Graduations (May). Each LEAD family is not only encouraged to participate in each of these experiences as a part of their LEAD customer experience, but are also invited to volunteer and engage other family and friends in these opportunities as a part of our building community. While we encourage participation in our events, families are not required to participate in any events or to volunteer their time in order for their student to attend the school.

Throughout the year, our school will host annual community and family events, including art shows, movie nights, cultural celebrations (e.g., Hispanic Heritage Month, Black History Month, and Native American Heritage Month), international festivals, and student-led conferences. These events will be hosted annually, generating a sense of excitement within the school community.

Throughout the year, parents receive weekly information sent home, including an update on student behaviors. LEAD regularly updates social media with important parent announcements and opportunities, as well as provides regular opportunities to connect with school leadership through Q&A forums, parent leadership council, and meet-and-greets. DeansList is another tool that all LEAD schools use to ensure timely communication with families about any policy updates or other announcements.

LEAD Southeast Middle and High School have already developed strong community partners, and we anticipate many of these relationships will extend to LEAD Southeast Elementary School. These include the Nashville International Center for Empowerment, Davidson County Sheriff's Office (SAAFE), Project Play Therapy, LLC, Metro Nashville Public Health Department, Meharry Medical College School of Dentistry, Camel Express Car Wash, Braces by Dr. Ruth, Planet Fitness, and Caron Treatment Center. LEAD will continue to seek new partnership arrangements where mutual benefits exist without compromising the educational program or the quality of experience for students or teachers. These relationships allow LEAD to focus work on students' academic education while ensuring that their broader education aligns with the school's mission. There are several additional categories of partnership and external support that LEAD will develop and customize in the communities served by LEAD Southeast Elementary School:

- **Nashville Business Community:** Build a series of relationships focused on increasing human capital and diversity in Nashville, combining financial support, volunteer opportunities, and internships and/or scholarships for LEAD students and alumni
- **Community-Based Organizations:** Create community-based enthusiasm and support for LEAD schools and combine efforts to address social and cultural challenges that might inhibit student success
- **Aligned Non-Profit Organizations (e.g., NAZA, YMCA, Boys and Girls Club):** Seek ways to leverage the activities of other organizations to enhance program delivery and reduce costs

g. If not already identified, describe any programs and resources you will offer to parents and/or the community and how they may support the school's mission and vision.

At LEAD, we believe that meeting students' needs — academically, physically, and emotionally — ensures success, even outside of school. An example of this is the way our LEAD Serve Others Stations (SOS Stations)

helped families during the pandemic by providing household essentials, internet assistance via hotspots, and cleaning supplies. Though initiated because of the pandemic and tornadoes from three years ago, we still operate the SOS Stations and will extend this practice to LEAD Southeast Elementary School. The SOS Stations help LEAD play a role in the resilience, strength, and courage that our families exemplify daily. Our network family engagement associate has created a streamlined process to support this initiative to ensure that we can continue to provide this as a resource for LEAD families for years to come.

Another example of this approach is our family workshop series, which is an engagement touchpoint that is based on family need, and provides a collection of on-going education to inform and educate families on various topics as members of our LEAD community. We solicit topics through Possip, our text-based family feedback platform, and family leadership team meetings, and engage faculty, staff, and community partners to provide the sessions. Lastly, our previously mentioned Possip bi-weekly surveying tool which will continue at each of our LEAD campuses as it is foundational to our customer experience efforts.

Our LEAD Serve Others Stations is a great example of not only building community, but more importantly, being a responsive community. Since its inception, we have added a number of services and initiatives to enhance offerings to continue to meet community needs. Our LEAD Ethos Exemplified Holiday Initiative spans through November and December and is our initiative that provides meals and holidays gifts for families during the holidays. This past year, we expanded our initiative to serve 70 families during the holidays. Additionally, our winter items drive has been in operation for the last three years due to a growing demand for support during cold weather.

The LEAD Care Portal was an initiative that was launched last year with the goal of taking meaningful action by connecting the largest network of caring people to meet the needs of kids and families in crisis. There are families that we identify as in crisis, homeless, in need of rental assistance and home living support, in domestic abuse situations, that we lean on our broader community to support. Through the Care Portal, we have been able to support more than 45 families with an economic impact of \$9,697.00 to date.

We will continue this work as evidenced by our plans to newly launch our LEAD Exchange this February to provide household essentials and basic necessities in exchange for families getting their child to school daily. At LEAD, we are committed to working alongside our families to ensure success for them and their students.

- h. Provide a needs analysis and description of the need for the proposed school, including how the proposed school would serve the interests and meet the needs of students and families in the communities the charter school intends to serve.

Our middle school families expressed interest in an elementary school option that gives them a similar experience to what they have had at the middle school and high school level. The addition of LEAD Southeast Elementary will serve the interests of our school community by providing a seamless, integrated K-12 experience for the families and community that we already serve in this area. We have a thorough approach to family engagement and communication; expanding our time with families from the current eight years (5th through 12th grade) to 13 years (K-12) will reinforce that relationship and allow it to grow even stronger. We will ensure a tight school community by providing opportunities for elementary students

to tour LEAD Southeast Middle, and send our LEAD Southeast Middle School ambassador students to visit and volunteer at the elementary school. An example could be asking our LEAD Southeast Middle students to serve as judges for the elementary school talent show. This is not only important to fostering connections between schools, but it allows students to understand a vision of what their future could look like.

Section 1.11 – Phase-In / Turnaround Planning

Section 1.11 is REQUIRED for applicants proposing to convert a school

In this section:

- a. Describe your organization's prior experience in turning around or converting an underperforming school. Include student outcomes and results. Describe how your organization achieved these results and address the challenges you faced in turning around that school. If your organization does not have such experience, please provide a comprehensive rationale that explains the suitability of your organization to successfully transform a struggling school.
- b. Describe how your organization will engage with the local neighborhood, community, and student population prior to the conversion. Explain your strategies and plan for recruiting an underperforming zoned student population.
- c. Describe specific ways that you will transform the existing school culture. How will you determine what parts of the existing school culture you will keep, modify, or add? How will you create a new identity while simultaneously respecting and reinforcing the building history and role in the community?
- d. If proposing a phase-in approach:
 - a. Describe how you will transition to a shared campus. Include your approach to sharing space, resources, and services, and collaborating with others on the campus. Be sure to outline any essential elements for co-location.
 - b. In the event that the LEA chooses to transition students out of the school sooner than originally planned, how will you minimize disruptions to your model?
- e. If proposing a full school take-over approach:
 - a. Describe your transition plan, including communications with existing staff.
 - b. Identify the additional teaching and non-teaching personnel needed to ensure student success beginning in year 1 of your conversion.

Not applicable.

Section 1.12 – High School Graduation and Postsecondary Readiness

Section 1.12 is REQUIRED for applicants proposing a school serving students in grades 9 – 12.

In this section:

- a. Explain how the proposed school will meet Tennessee graduation requirements in accordance with State Board policy 2.103. Describe how students will earn credits, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements exceed those required by the State, explain the additional requirements.
- b. Describe how graduation requirements will ensure readiness for college or other postsecondary opportunities (i.e., trade schools, community colleges, military, or workforce).
- c. Outline systems or structures the proposed school will use to assist students at risk of dropping out and/or not meeting graduation requirements.
- d. Describe plans for incorporating early post-secondary and work-based learning opportunities for students.
- e. Identify each type of high school diploma to be offered at the proposed school.

Not applicable.

Section 2 – Operations Plan and Capacity

Section 2.1 – Governance

In this section:

- a. 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.
- b. Describe how the board will evaluate the success of the proposed school, the school leader, and its own performance.

The current LEAD board is composed of 14 individuals, including a family representative, all of whom are committed to work with LEAD management to ensure student and school success. These board members represent the major constituencies needed to support effective and efficient operations, including academics, finance, fundraising, marketing, information technology, human resources, and facilities management, among other areas. The Board has legal representation and utilizes it as necessary.

The LEAD Board of Directors provides both oversight to the network as a whole, as well as oversight to individual schools. At board meetings, board members regularly review academic, school culture, operational and financial performance data. Board members also maintain a pulse on individual school interests and performance through monitoring staff, student and parent survey data. This data is provided in both a network view, as well as on an individual school basis, so that board members can monitor the health of individual schools. In addition, School Principals representing the interests of their unique schools, regularly present to the LEAD Board. Board members participate in the life of the school, including volunteering at events such as Student Led Conferences. The LEAD Board is committed to the success of each individual school, and works with the CEO and management team to proactively address any school deficiencies identified in either the board data review, or concerns brought by the management team.

The LEAD Board consist of several active committees, including:

- Executive Committee: This committee is composed of the Board Chair, chairs of all other committees and the CEO. It is responsible for advising the CEO and Board on major strategic decisions, responding to urgent situations, setting the agenda for board meetings, guidance and oversight of other committees, and board-related budget items
- Governance Committee: This committee is responsible for nominating additional board members, leading the CEO annual evaluation, reviewing the compensation of the CEO and the CEO's direct reports, and performing an annual self-evaluation of the board's effectiveness.
- Finance Committee: This committee reviews and makes recommendations to the Board concerning all policies relating to the financial operation of the organization (and its subsidiaries), including the current operational budget, annual audit, and other financial endeavors. It works with the chief financial officer in developing the budget and reviewing annual and long-term financial performance.
- Development: This committee works with the VP of development to oversee fundraising campaigns, both general and special, as the Board deems necessary for the continued operation, growth, and development of the organization.

- Academic: This committee works with the chief academic officer to review academic performance and to make reports and recommendations to the Board to sustain and improve academic outcomes.

It is the board's responsibility to ensure that the total organization is effective in achieving its mission and efficient in using its resources. The Board of Directors regularly requests and receives reports on academic, financial, operational, compliance, and strategic results that are documented in approved minutes to meetings and posted publicly on LEAD's website. The Board establishes academic, financial, and enrollment goals each year and tracks against this progress regularly. The LEAD Board of Directors reviews all audits, 990 tax returns, nominates and elects new board members, conducts official business on behalf of the organization, evaluates organizational performance.

A conflict of interest policy is in place and annual conflict affidavits are signed by each board member. The Board holds all meetings in accordance with the state's Open Meetings law and records minutes for all meetings on the LEAD website.

The Board hires and completes annual evaluations of the CEO who is responsible for overall management of the LEAD organization and the results of all schools in the LEAD organization. The Board of Directors approves the expectations, compensation and performance of the CEO on an annual basis, taking into account national benchmarking of similar roles. The Board ensures that long term executive leadership is in place and that effective succession planning is occurring. The CEO then hires, manages and evaluates all the members of the executive leadership team. The Board reviews compensation of both the CEO and executive level leadership each year.

- c. How will the board develop over time? Explain plans for recruiting board members with identified skills and addressing board member attrition.

The Governance Committee is responsible for attracting, evaluating, and nominating potential board members and ensuring adequate parent representation amongst the board. LEAD Board policy allows for up to 20 board members, compared to our current 14. We plan to slowly increase the size of our board by three or four additional members to continue to build out committees and to allow for attrition due to term limits. Even once the final size of the board is achieved, the Board will continue to recruit new members to ensure effective succession planning, over the next charter term. Our board members view new board recruitment as an ongoing responsibility and play an active role in attracting new members to our organization. Board members nearing the end of their board tenure often bring one to two prospective new candidates for evaluation. We also source board members from members of the public and LEAD Community who have shown an interest and support for our work. This focus on continuous member development ensures a long term sustainability for our board. Board members have clear expectations and orientation for their roles and participate in various committees to further support the school.

- d. 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 all annual board training to be approved by the State Board of Education; documentation of this training must be provided to the authorizer.

The Board completes annual training as required by law and via Tennessee code as prescribed in this section. Training has previously been coordinated by the TN Charter School Center, but our practice is currently changing to be in alignment with the new law passing responsibility of approving training requirements to the State Board of Education. Completion of training is monitored and tracked by leadership staff.

- e. Describe the circumstances under which complaints will be brought to the board, and the process for addressing them.

The student handbooks have complaint procedures documented and the Board is available to ensure due process is given to any and all complaints. The process is five steps and is outlined as follows:

1. **Direct Conversation.** If a parent has a misunderstanding or disagreement with an instructor, the parent should address the concern to the specific instructor directly involved with the circumstances surrounding that concern. The staff member will meet with the parent as soon as possible, but in no case longer than five (5) school days after the instructor has been notified of the concern;
2. **Fact and Possible Resolution.** If a parent or instructor is not satisfied with the outcome of Step 1, a meeting will be arranged in an appropriate timeframe, but in no case more than five (5) school days after the meeting in Step 1. No further action is taken unless the parent submits a written request seeking an additional remedy;
3. **Formal Process.** If a parent's concern has not been satisfactorily resolved in either the first or second step, the parent should refer the matter to the School principal in writing. A meeting will occur within 10 school days; the principal or a designee will provide written dispositions to each party within five (5) school days;
4. **Ad Hoc Board Committee.** If either party is still dissatisfied with the outcome of Step 3, an Ad Hoc Committee is convened to provide the final review.

- f. Complete the provided template for Table 3: Board Members. List all current and identified board members and their areas of focus or expertise in the following table, adding rows as needed.

- g. Provide the following governance documents as attachments:

- Articles of Incorporation as Attachment H
- Proof of non-profit and tax-exempt status as Attachment I
- By-laws as Attachment J
- Code of Conduct as Attachment K
- Conflict of Interest Policy as Attachment L
- Board member resumes or biographies as Attachment M
- Board policies (including frequency of meetings, open meetings, and open records) as Attachment N

Table 3: Board Members

Name	Address	Current Role	Area of Focus / Expertise	Board Position	Proposed Total Term Length
Mike Honious	2835 Brick Church Pike	President & CEO, GEODIS	Executive Leadership; Development; Operations; Public Relations	Board Chair	3 years*
Dr. Annette Little	2835 Brick Church Pike	Professor, Lipscomb University	Education; Curriculum	Academic Committee Chair	3 years
Rob Keller	2835 Brick Church Pike	VP, Client Services, Asurion (Retired)	Marketing; Customer Relations; Organizational Experience	Development Committee Chair	3 years
Dr. Earl Lattimore	2835 Brick Church Pike	Instructor/ Program Coordinator, MeHarry Medical College	Parent/Community Involvement; Education	Director; Parent/ Family Representative	3 years
Carter Paine	2835 Brick Church Pike	CEO, Wayspring	Finance; Operations; Public Relations; Management/Organizational Experience	Director; Former Board Chair	3 years
Dwayne Tucker	2835 Brick Church Pike	CEO, LEAD Public Schools	Community Service; Executive Leadership; Public Relations; Fundraising; Legal expertise; Human Capital; Marketing	Director; LEAD CEO	3 years
Jonathan Dyke	2835 Brick Church Pike	CEO, FutureSelf Network	Marketing; DEI; Entrepreneurship	Director	3 years
Dr. Bryan Fisher	2835 Brick Church Pike	Vascular Surgeon; The Surgical Clinic	Medical	Director	3 years
Valerie Hayes	2835 Brick Church Pike	Managing Director, Deloitte	Finance; IT; Management/Organizational Experience; Community Service/Outreach	Director	3 years
Jerome Oglesby	2835 Brick Church Pike	Global Chief Technology Officer, Deloitte	Operations; IT; Executive Management; Community Service	Director	3 years

Linda Pannock	2835 Brick Church Pike	Managing Director, Ankura (Retired)	Strategic Planning; Change Management	Director	3 years
Alex Ryerson	2835 Brick Church Pike	Partner; Luxor Capital	Finance; Fundraising	Director	3 years
Jim Vesterman	2835 Brick Church Pike	Founder, Raptor Technologies (Retired)	Operations; School security	Director	3 years

*Per our governance requirements, all board terms are three years.

Section 2.2 - Start-Up Plan

In this section:

- a. 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.

LEAD Public Schools has developed and utilized a robust school start up plan for all prior school openings. See Attachment MM.LEAD School StartUp Plan in the Appendix for a detailed copy of this plan which includes detailed task lists for each division of our organization, who owns each task, which staff members are involved in supporting each task and the start and end date for each. This start up plan will play a key role in guiding the work and assessing readiness to opening.

Many of these tasks are the same process we use for the opening of every school year; however, the most significant areas unique to new school start up include:

Secure School Facility: Immediately upon school approval, the COO will direct our facilities brokerage firm to work on offers to existing identified properties. The CFO will notify our lenders of our intent to purchase or lease a facility. See the facilities section for more details.

Make initial round of key hires to support the Planning Year - Immediately upon school approval, we will begin hiring three key roles to support the Planning year. With support from our HR team, the Head of Schools will hire the School Principal from within our Talent Development pipeline. The network team will hire a Director of School Operations and a dedicated Family Engagement Coordinator. Our goal is to have each of these critical roles filled no later than September 2024.

Secure Startup and Ramp-Up Funding: The VP of Development and the CEO will secure necessary startup funding with the expectation that by Year 3 is reached the school will be financially sustainable on per pupil funding, if not sooner.

Engage School Parents and Community: Immediately upon school approval, the Director of Enrollment and Family Engagement will begin conducting outreach to existing LEAD Southeast Middle and High School parents and community members through local organizations in target communities to determine need, readiness, and support. This work will transition to be led by the dedicated FACE team member hired in the summer.

Enrollment Activities: Founding staff under the direction of the Director of Enrollment and Family Engagement will execute a recruitment and community engagement strategy that includes but is not limited to the following activities: conduct information sessions, execute a marketing and communication plan, and execute an extensive canvassing campaign to build an application pool. We also visit elementary schools, pre-k centers, and churches to expand our outreach.

Develop Recruitment Pool of Effective Teacher Candidates – The VP of HR, supported by the HR team, will implement its annual talent recruitment strategy for a coordinated approach to create a pool of highly qualified teachers from which the School Principals can recruit, interview, assess and ultimately hire. This plan has been updated to support the recruiting of elementary licensed teachers.

Implement Start-up Operations Checklist: Immediately upon approval, the COO will be responsible for managing the detailed school opening checklist (attached in the appendix) and provide technical assistance and hands-on support to meet our timeline. This includes all aspects of charter start-up, student recruitment, master program planning, master school calendar, the school schedule, instructional supplies and materials, safety plans, student assessment schedules/procedures, and outsourcing with service vendors for food, transportation and other necessary services.

Provide Consistent and High-Quality Professional Development Programs for School Leaders, Staff and Teachers: LEAD offers robust training and development prior to the start to the school year for all staff members administered by both internal and external experts. With the founding of our first Elementary School we will have elementary school experts from both local and national organizations present to support elementary school content, pedagogy, and culture. This program is titled LEAD University and is mandatory for new and returning staff members to attend. A sample itinerary/agenda for LEAD University can be found in the Professional Development section.

- b. Describe what you anticipate will be the challenges of starting a new school and how you expect to address these challenges.

LEAD Public Schools has launched six schools in Davidson County and as a result, has had to navigate several challenges. Despite the challenge faced, all schools have all had successful startups. The primary challenges we anticipate for LEAD Southeast Elementary are time, facilities, talent, enrollment and expanding our model to elementary.

Charter school authorization may take longer than anticipated, thereby shortening our Year 0 Planning Year. Short startup timelines make it difficult to conduct the broadest possible talent searches and limit the amount of community outreach LEAD can do in advance of school launch. Currently, LEAD is addressing the time challenge by having developed a pipeline of leadership and talent well in advance of charter approval. In addition, we have a team of exceptional leaders (academic, operations, finance, fundraising, and communications) that are all closely involved in the startup of any new LEAD school. This gives LEAD tremendous startup capacity. While it has a significant cost, LEAD believes it is the right use of resources to appropriately plan and launch a new school and substantially addresses the challenges of short timelines between charter approval and the beginning of school.

Another challenge is syncing up the charter authorization timeline with adequate facilities. Financing for a new building is contingent on charter school approval. We have worked extensively with our facilities brokers and external facilities consultants to identify potential sites, but completing the real estate deal will be contingent on an approved charter. Should the timeline prove unfeasible to purchase and renovate a facility, we may need to seek a one year delay in school opening as a result. The timeline for the school opening is dependent upon when approval is granted for a new elementary school. We do not view a potential delay in opening as a negative impact to families. When polling families, they were asked about their interest in attending a LEAD

Public Schools elementary school, if they currently have or will have elementary school aged children, beginning 2025. Therefore, families understood that the school had not been approved and that we were soliciting interest. Families who desire to attend a LEAD elementary school would still have the opportunity to enroll, with the one year delayed opening.

Ensuring a strong enrollment pipeline is always a concern of a new school start up. While overall district enrollment has declined over time but is increasing in the area we are choosing to serve. Schools must maintain a minimum size in order to fund the school services that students need. We also have a strong enrollment team and plan for local outreach that will result in families choosing their neighborhood school. We have learned that both dedicating a full time FACE member to each school, as well as funding that position for a full school year prior to opening, is necessary to ensure the dedicated focus on marketing the school and engaging our first families. In addition, it is unreasonable for any school to assume they will achieve full enrollment in each grade in the first year of operating a school. We are planning for lower enrollment in our first year (with the financial model to support that). This allows us to recruit a smaller family base in Year 1 and then use that as a launching pad for additional enrollment in future years.

Additionally, and similar to the district and other schools across Tennessee and nationally, recruitment of excellent teachers and leaders is a challenge. LEAD is addressing this by prioritizing teacher retention (which makes recruitment easier) through its performance compensation program, creating significant teacher training and professional development resources, and leadership development pathways. LEAD's pay-for-performance program enables teachers to earn up to a 10% increase in base salary annually and its master teacher program allows exceptional teachers to develop their leadership capacity while remaining in the classroom. Additionally, LEAD has a five-week summer training institute, LEAD University, that all staff participate in and that is structured to address both teacher and school leader needs at differentiated levels.

Finally, this school will be our first elementary school as a network. To mitigate this concern, we have hired a team of experienced elementary leaders to develop our model and successfully launch our school. Our team has carefully considered how to maintain core elements of the "LEAD way" while reinventing our approach for an elementary school.

Section 2.3 – Facilities

In this section:

- a. 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, work room/copy room, supplies/storage, teacher work rooms, restrooms, and other spaces.

Our facilities needs have been designed with our academic and school culture model in mind. This design allows for ample space for both core instruction, intervention and service of special populations. In addition, it includes workspace for teachers and school leadership. For the first year of operation we will plan on having 6-8 classrooms. Classrooms will increase proportionally as the school grows, with core content classes having a dedicated classroom. Classrooms may vary but typically range from 700-900 sq. feet per classroom. Along with dedicated classrooms, we will also need small pullout spaces in order to accommodate RTI, Ex Ed Assessment, conferencing, testing, and student services support/counseling. We will require rooms dedicated to teacher work space which will house copiers and other common planning resources. There will be a main office and offices for all counselors and school leadership teams. We will also require a large cafeteria, gym, and media center.

We plan on having a science and art classroom available for each science and art teacher as the school grows. There is no need for a computer lab as we will utilize 1:1 chromebooks. There will be a main teacher work space on each floor of the building which will house centralized shared resources for teacher use. Other specialized spaces will include: a cafeteria to fit at least two full grade levels at one time, at least three leadership team offices, a main office with space for an office manager and receptionist, a large copier space on each floor of the building with two smaller workstations on each floor for smaller printing needs while offering quiet workspace. We will have at least two storage locations per floor for custodial and instructional supplies. Outside, our facility will need to include adequate acreage to meet zoning requirements, including a bus drop off lane, parking for staff and visitors and ample space for a playground and activity area adjacent to the school.

Below is a more detailed assessment of the needs and related square footage of the required facility space. Overall, we anticipate needing roughly 160 square feet per student, which is slightly higher than our local elementary benchmarks of 80-110 square feet per student (see benchmark data below); this is a result of a slightly less "efficient" space allocation due to the smaller enrollment of the school in comparison to our benchmarks.

LEAD Elementary Facility Needs				
Enrollment	360	students		
Space Type	Number	Square Feet	Total	Notes

Core Content Classrooms	18	800	14,400	Consistent with other LEAD schools
Breakout Rooms	4	350	1,400	
Additional Classrooms for Specials	3	800	2,400	
Art Room	1	1,000	1,000	
Offices	4	250	1,000	
Gym	1	12,500	12,500	
Cafetorium	1	4,000	4,000	
Kitchen	1	2,695	2,695	Full Service Kitchen
Library (Media Center)	1	1,500	1,500	
Student Restrooms	4	180	720	360 SF per set of M/F restrooms
Staff / Unisex Restrooms	3	60	180	
Reception	1	120	120	
Main Office	1	750	750	
Conference Rooms	3	160	480	IEP meetings; testing
Teacher Lounge / Workroom	1	750	750	
Nurse	1	250	250	
Storage	3	250	750	
Janitorial	1	125	125	
AV/IT, Mechanical	1	200	200	
<i>Circulation</i>		<i>25%</i>	<i>11,305</i>	
Total Square Feet			56,525	
<i>Square Feet per Student</i>			<i>157</i>	
Square Footage Benchmarks of similar charter schools built in past 5 years				
Select Benchmarks	SF / Student			
LEAD Elementary School (proposed)	157			
Nashville Comp 1 K-8	82			
Nashville Comp 2 K-8	86			
Indianapolis Comp 1	101			
Memphis Comp 1	111			

- b. Explain how the above-described facility needs to be tied to the related items in the proposed school's budget.

The full costs associated with purchasing, developing, outfitting and financing the new facility are included within the debt service assumptions in the proposed school budget. Facilities costs are based on a 56,525 square foot property and have been both vetted by our facilities consultants and benchmarked against other similar school builds completed in the Nashville area over recent years (and updated for current inflation). Included in assumptions are ample contingency, legal fees, financing fees and annual interest. Outside of the debt service line item, we have also budgeted for ongoing facilities maintenance, utilities and custodial costs. See the school budget attachment and narrative for further details. The budget assumptions are for \$714,000 annually and is a locked debt service over the life of the loan; payments will not balloon after five years.

- c. Describe the experience of the board and/or leadership team in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

LEAD Public Schools has leadership experienced in both facility acquisition and facilities management. With a dedicated C-Level team (Chief Executive Officer, Chief Financial Officer and Chief Operating Officer) with experience in supporting Charter Management Organizations with their facilities needs.

LEAD has experience operating out of rented facilities, district facilities and constructing and renovating private facilities and has the financial and operational resources to ensure that a suitable permanent home is developed for this school. An example of this experience is at LEAD Southeast Middle and High School's current location at 531 Metroplex Drive. LEAD identified this space in 2012 and engaged brokers to buy the space. Once the office park was purchased, LEAD engaged in a renovation of the space and, in fewer than six months, renovated two out of the three office buildings into a school, including a fully functioning kitchen with a cafeteria large enough to support a full 5-12 school. The second and third phase of renovation work added grades 5-8 and then 9-12 in the building with the construction of a fourth building as a PE space. The full project was paid off in full with no remaining debt in 2021.

In terms of facility management, LEAD has dedicated on the ground full time employees tasked with ensuring our buildings are safe and fully functioning. These Directors of School Operations are tasked with managing any of our managed services vendors dedicated to ensuring our building is ready for teaching and learning each day. They are in charge of all: custodial services, nutrition services, technology services, and all preventative maintenance which is handled by Metro Nashville Public Schools in our district spaces or other 3rd party vendors in our independent locations.

Finally, LEAD has solid relationships with key real estate and facilities vendors. See below for further information.

- d. 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.

The LEAD Board is committed to leasing, or purchasing a facility for the school. To prepare for a facilities plan, LEAD has already engaged with a third party facilities acquisition company with over 70 years of combined experience helping charters secure and build facilities. We also have engaged with an experienced broker who has a robust process of locating sites both on and off market. This broker has completed over \$1.3 billion in real estate transactions over the past decade. LEAD has an established relationship with multiple architecture firms and contractors who we would seek to engage in a bid for services should they be needed.

In working with these facilities experts, we have worked through a project plan, associated timeline, financial model, and recommended list of financiers should we need to purchase a new facility. We have done the due diligence to consider both a new build or a creative reuse of an existing facility and have outlined the square footage, acreage, and codes requirements of a suitable site. Any new facility would be chosen based on geography, with an attempt to locate the school in the area most convenient for the most number of families, as well as ensuring a new site meets the programmatic and legal requirements.

- e. 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 Tenn. Code Ann. § 49-13-107. Include associated costs in budget details.

LEAD Public Schools will comply with all health and safety laws, rules, and regulations of the federal, state, county, region, or community that may apply to the facilities and school property. LEAD Public Schools will ensure all facilities meet codes for ADA, sanitation, fire, construction, stability, temperature, ventilation, and suitability of physical space. Before allowing access to the LEAD Public Schools site, LEAD Public Schools will secure a Certificate of Occupancy from the required government agency. LEAD Public Schools will also grant access to local health and fire department officials for inspection of the premises or operations of the school for purposes of ensuring the health, safety, and welfare of students and employees pursuant to Tennessee Statutes and National Fire Protection Association Life Safety Code, N.F.P.A. 101.

- f. Present a timeline with reasonable assumptions for facility selection, requisition, renovation, state fire marshal and health inspections, and occupation.

Based on our planning with external facilities experts, benchmarking of other school development projects, and our own experience converting commercial space into a 5-12 campus, we anticipate facilities development to require 24-30 months of lead time and would likely take the form of a purchase and renovation of a local commercial space.

- g. Broadly describe a contingency plan, should your facility fall through.

Ensuring a successful school launch is critical to the eventual success of the school. Our preference is to purchase and renovate a facility. Our next preferred option would be to lease a facility for one to two school

years with an option to purchase thereafter. Should a lease agreement not be signed by Winter 2024, we would work with MNPS to push back the opening of LEAD Southeast Elementary to Fall 2026 to allow for an additional 12 months of facilities development. We would prefer to open the school correctly rather than quickly and would be prepared to fund any Planning Year staff for an additional year if we were to need to execute on our backup timeline.

- h. List any properties you have considered and may have already identified as suitable to meet the proposed school's facility needs.
 - a. If the current proposed property is under a non-disclosure agreement, in lieu of listing the property address, describe the general geographic location/neighborhood/zip codes. Describe any modifications and/or revisions necessary prior to opening.
 - b. If no suitable facility and/or property has been identified, how has the sponsor determined that suitable facilities exist within the proposed geographic location.

LEAD Public Schools has previously completed both an on market and off market search in the geographic area surrounding the proposed recruitment zone. Available facilities options that LEAD is considering include:

- 490 Metroplex Drive, Nashville TN, 37211- this building is currently for lease or purchase. The LEAD executive team and architects have toured this facility with our broker.
- 525 Metroplex Drive, Nashville TN 37211- the owners of this facility have communicated their intent to vacate the building in the near future and have met with our facilities brokers. Members of our executive team have toured this facility.
- Leasing space in the area. Examples of recently available locations that have already been identified include:
 - 1717 Elm Hill Pike, Nashville, TN 37210
 - 655 Grassmere Park Dr, Nashville, TN 37211
 - 550 Metroplex Dr, Nashville, TN 37211
- Partnering with other schools (either district or charter) to co-locate or use underutilized space.

Section 2.4 - Personnel / Human Capital

In this section:

- a. Describe the school's proposed leadership structure. Include a copy of the school's organizational chart for Year 1 as Attachment O and at full capacity as Attachment P. 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.

The LEAD Public Schools Board of Directors is ultimately responsible for the success of the organization—academically, operationally, legally, financially. The Board approves the mission, key strategies, budget and financial performance of the entire organization upon the recommendation of the CEO and executive team. The Board hires, evaluates and holds accountable the LEAD CEO. The LEAD executive team consists of experienced education professionals, including the chief academic officer, head of elementary schools, head of middle schools, head of high schools, chief financial officer, chief operating officer, chief HR officer, chief strategy officer, VP of development, director of enrollment and family engagement, and director of communications. Each LEAD school is led by a principal who is supported and evaluated by a head of schools.

The school principal is the person responsible for the success of the school. This individual is supported by a School Leadership Team (SLT) composed of the school principal, assistant principal of instruction, assistant principal of students and director of school operations. All school staff ultimately report up to members of the SLT. In addition, all LEAD schools have a Parent Leadership Council who provides advisory input to the School Leadership Team on a regular basis.

- b. 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 as Attachment Q.
- c. 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.

LEAD Public Schools has hired a team of elementary experts to develop the elementary model and provide leadership to the school, once opened. See attached for their resumes. This team includes a proven elementary school principal who can be assigned to one of our two anticipated elementary schools. In addition, LEAD Public Schools is developing leaders within its own organization who may be considered for principal positions through our leadership development program, as well as conducting an external search. Upon charter acceptance, we will match our principal hires to the schools based on fit for the school community.

Our school leadership team hiring process at LEAD Southeast Elementary School will be a meticulous journey designed to identify a candidate possessing specific leadership competencies crucial to the role. We will actively seek an individual who is a visionary, a people developer, inspirational, academically focused, community-oriented and who has a track record of success working in schools who serve similar communities. Our search will consist of looking internally at our leadership development program as well as completing a

thorough external search. Part of LEAD's leadership development program is our bi-annual talent calibration process (outlined below) which helps to identify leaders who are role ready. Once leaders are identified as ready, they are listed as successors for a specific role and are given targeted development plans to ensure they are set up for success in that role. We will look to this process to see if there are any internal candidates who meet our timeline for role readiness.

We will commence the external process with a detailed job posting. Prospective candidates will submit applications and resumes, subject to a thorough review for shortlisting based on initial criteria by our Human Resources team. Shortlisted candidates then engage in a multi-round interview process, involving stakeholders like current LEAD school administrators, teachers, and individuals from our Network Support team. Assessments during interviews will focus on the candidate's vision, leadership style, people development skills, commitment to academic outcomes, and ability to understand the community being served. Skills and knowledge assessments related to these qualities may also be part of the process, along with reference checks. Community engagement proficiency is assessed through the candidate's understanding of local community needs and strategies for fostering positive relationships. A bachelor's degree is required while a master's degree is preferred, academic credentials are verified before the final decision on the selected principal.

Two times per year, network and school leadership teams conduct talent calibration sessions to identify high potential talent across our network. Those identified as high potential/high performing (network executive, principal, assistant principal, instructional manager) are provided an executive coach and personal development plan based on the skills needed to develop in order to take on new responsibilities in the network. Across the LEAD network, we have identified a list of staff who have been identified as ready for school principal responsibilities now, in one to two years, and in two to three years.

School principals must have a proven history of exhibiting the judgment, leadership, and communication skills necessary to effectively lead a school in a way that enhances the LEAD culture and achieves extraordinary results. Each school principal is expected to lead through service to others, be able to quickly build and enhance the LEAD culture, have a command of research-based instructional practices, and demonstrated ability to create and maintain high expectations for both students and staff. Skill and experience in using data to modify instruction and coaching and evaluating teachers is a critical skill area. School principals participate in regular monthly meetings with the LEAD Public Schools network support team and other principals to develop the leadership and functional skill to successfully support and operate their respective campuses.

School principal candidates must have: previous school leadership experience as principal or assistant principal; experience supervising and evaluating staff and serving as an instructional leader and staff manager; experience recruiting, hiring, and building strong teacher and staff teams. Other qualifications include: the ability to form productive relationships with students, families, and staff that enhance school culture; the ability to improve communication, and reinforce expectations for all and demonstrated success teaching and leading students, particularly those in underserved or urban communities; and demonstrated success developing school programs and school culture. They must also have an obvious passion for being part of a team-oriented, mission-driven school culture. A bachelor's degree from an accredited educational institution is required and a master's degree from an accredited educational institution is preferred.

Each school principal is supported and managed by the head of schools to ensure the school is making progress on meeting its objectives. School principals meet with the heads of schools, the chief academic officer, and other network school principals, on a monthly basis, to receive professional development and get the support of a community of similar individuals. Often a problem of practice is identified and shared with the team to receive feedback. School principals are also given a professional, licensed executive coach from outside the organization whose sole purpose is to provide coaching support for school principal leadership and management. School principals regularly participate in external professional development, based on their unique needs, strengths, and weaknesses and a PD budget exists for their individual development.

All support staff, including school principals, are evaluated using our support performance evaluation framework, which is aligned to our shared leadership behaviors and succession planning. We are seeking a waiver from State Board Policy 5.201.

- d. 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, required experience, 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 R](#).

LEAD Public Schools recruits, selects, and hires the highest caliber teachers and support staff. Our talent and recruitment team members work year-round to develop potential hiring pipelines, referrals, and relationships with key stakeholders in order to develop potential applicants and hires for the upcoming school year.

Hiring and maintaining a consistently high-quality instructional staff is critical to the LEAD school model. Since LEAD Public Schools will hire instructors from a wide variety of backgrounds, ranging from experienced instructors and recent college graduates with no teaching experience, its initial and on-going human resource processes and assessment criteria are tailored to continuously refine our approach and ensure that LEAD Public Schools continue to hire and retain extremely capable staff.

Our process at LEAD is designed to be rigorous and comprehensive, focusing on identifying candidates who not only possess the necessary professional competencies but also align with our core Ethos values of commitment, courage, self-reliance, discipline, and service to others. We utilize a performance-based approach that involves candidates completing tasks and assessments directly related to the responsibilities of the position they are applying for. These tasks are carefully designed to evaluate candidates' skills, knowledge, and problem-solving abilities in real-world scenarios, providing valuable insights into their potential contributions to our team.

To ensure consistency and fairness in our evaluations, we employ a rubric that outlines specific criteria based on our professional competencies and Ethos values. This rubric serves as a guide for scoring candidates objectively and transparently, taking into account not just their technical capabilities but also their alignment with our organizational culture and values.

We have had a tremendous amount of success in recruiting and hiring outstanding, mission-driven instructional staff members who have been the basis for LEAD's sustained results. By systematically studying its highest performers, we have identified traits that differentiate top-performing teachers from low-performers. LEAD Public Schools' data driven hiring process determines if our candidates have the following competencies in order to be successful in our schools:

- Mission Fit
- Teaching Ability
- Coaching Ability
- Grit/Perseverance

Our hiring process specifically addresses each of these areas through targeted questions. For Mission Fit, we ask specific questions around the candidates experience working with low-income populations similar to LEAD. For Teaching Ability, scenario-based teaching questions are asked but candidates are also required to either teach a sample lesson or provide video of them teaching. Coaching Ability is gauged through scenario-based questions and candidates are also given feedback and coaching on their sample lesson/coaching video to see how receptive they are to coaching/feedback. Finally, we look at scenario-based questions aligned to our Ethos behavior to get a better understanding of the candidate's experience persevering through difficult situations in a school-based or other work setting. At the end of each interview, all the data is collected electronically and used to help make a hiring decision. LEAD Public Schools also utilizes multiple people in the interview process in order to build capacity in our staff and their investment in the next hires.

Each year, our recruitment strategy is updated based on our annual data report from the previous recruitment and hiring season in order to better identify and target trends that come about from that data. LEAD Public Schools actively recruits and targets teachers who have at least one to two years or more of experience and prefer our candidates to come from urban teacher environments. We connect with these candidates through referrals from current staff, job postings, job fairs, and LinkedIn searches. In addition to targeting experienced teachers, LEAD Public Schools attends all Tennessee School of Education job fairs and additional ones in Alabama, Mississippi, Arkansas, Texas, Georgia, and Kentucky. Partnerships with Teach for America, Blueprint, Nashville Teacher Residency, high-performing charter schools, and CMOs around the country, and relationships with local and state universities continue to provide a valuable pipeline for the most qualified, dedicated, and passionate applicants to apply for positions within LEAD Public Schools.

The typical annual hiring process begins at the end of November and continues through June of each year. However, for a new school, we firmly believe that key leadership and support staff must be in place prior to our typical process in order to ensure an effective school start. For LEAD Southeast Elementary, our timeline is as follows:

- **Spring 2024:** LEAD Southeast Elementary charter application is approved.
- **June 2024:** Recruitment begins for key roles, including School Principal, Asst Principal of Instruction, Director of School Operations, and family engagement associate. Internal candidates for school principals for LEAD Southeast Elementary will be identified, as will their successors. An external principal search will be conducted concurrently with internal talent calibration.
- **September 2024:** Key staff have been hired and have 12 months to prepare for school opening.

- **July-December 2024:** If any members of key staff (principal or assistant principal) are internal hires, there will be a six month process for identified principals to release responsibility of their current role to their successor.
- **Jan 2025:** Key staff are 100% dedicated to school launch. Launch of annual talent recruitment process for all other staff.
- **March 2025:** Key school-based staff members are hired by the school principal. Those include two assistant principals, ELA instructional manager, Math instructional manager, ExEd instructional manager and ELL instructional manager.
- **June 2025:** 95% of school staff should be hired.
- **July 2025:** 100% of school staff should be hired.

The leaders who will be responsible for the academic performance of the new schools in LEAD Southeast Elementary are the same individuals responsible for the current performance of LEAD schools. See Attachment L for academic performance of the LEAD network. In addition, see attachment R for the most recent publicly available data for non-LEAD schools that were led by our head of elementary schools.

- e. 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?

In order to best serve LEAD students, we believe students must be surrounded by diverse and well-prepared educators. Further, it is important for students from diverse backgrounds to be taught by diverse educators who demonstrate that success is not predetermined by where you were born, what neighborhood you live in, the color of your skin, or the income of your family.

As part of our ongoing recruitment process, LEAD takes several different approaches that build a diverse pipeline of candidates. Year-round candidate searches include posting on diverse job boards and attending diverse recruitment job fairs at HBCUs and other diverse institutions. Additionally, we run targeted referral campaigns throughout the year where diverse staff are able to refer candidates of color. Lastly, our talent recruitment team has specific performance metrics around hiring diverse candidates.

In addition to our ongoing recruiting efforts, LEAD will continue to implement its Teacher Pathways Program by enhancing current partnerships with Relay, Nashville Teacher Residency (NTR), Lipscomb University, Tennessee State University, Man Up, Blueprint Math Fellows, and more with the goal seeking more qualified, diverse educators to serve our unique student population. Engaging with multiple partners allows for a diversity of programming that will meet the needs of more individuals seeking the teaching profession through non-traditional routes. We will identify potential candidates from our pool of paraprofessionals and substitute teachers (75% identify as POC compared to 24% of our current teaching staff) currently working in LEAD schools that earn high performance ratings and possess an undergraduate degree, but lack Tennessee teacher certification; a pool of potential educators currently leading in the vibrant BIPOC communities of Nashville and acknowledge a vast pool of unknown potential talent currently working in other professions who may wish to transition into a career in education.

As it pertains to leadership positions, our overall talent strategy is to develop leaders internally. Therefore, the more diverse our pool of teachers and other school support staff is, the more diverse our pool of potential

leaders will be. Over 85% of our current school leadership positions have been filled by internal candidates. We plan to continue with internal development/promotion as we continue to grow.

See the Appendix Attachment MM for greater detail on our Leadership Development Plan.

- f. How will you ensure that teachers are licensed and endorsed in their content areas?

Compliance with Teacher Licensure is the responsibility of the CHRO and the talent recruitment manager. LEAD seeks to recruit and retain teachers who have already secured their Tennessee license, but actively supports teachers in transferring licenses from out of state. Our application process includes space for educators to disclose their licensure status. Licensure data is tracked and monitored in TNCompass and loaded into our HRIS system to ensure accuracy. LEAD also provides training support and financial assistance for certification programs and Praxis exams to gain initial certification or add endorsements. LEAD also uses state issued Academic Permits and Academic Waivers to bridge the gap between initial hire and program completion for some individuals. As English learner certification is one of the most difficult certifications to find the necessary staffing for, LEAD has cultivated a partnership with Lipscomb to pay for English learner endorsements, as needed, for those who are seeking to teach English learners and commit to continue working at LEAD.

- g. Indicate the state-approved evaluation model used for teachers, required by State Board Rule 0520-02-01 and State Board Policy 5.201.

LEAD Public Schools uses the Tennessee Educator Acceleration Model (TEAM) to evaluate all licensed teaching staff. This model engages principals and teachers through “frequent observations, constructive feedback, student data, and professional development”¹⁶. TEAM Certified school leaders observe teachers at multiple points during the year and score them using the TEAM rubric. Scores are then submitted to the state via TNCompass.

- h. Describe the policies and procedures for evaluating staff, providing feedback, and celebrating excellence.

LEAD Southeast Elementary is dedicated to establishing robust policies and procedures to govern the evaluation of staff, provide constructive feedback, and celebrate excellence within its academic community. These processes are pivotal in cultivating continuous professional development, maintaining high-performance standards, and recognizing outstanding contributions.

In terms of staff evaluation, the school will communicate clear performance standards and expectations to all its staff members. The evaluation framework will be comprehensive, encompassing three TEAM formal observations, one TEAM professionalism evaluation and self-assessment. This

¹⁶ <https://team-tn.org/>

holistic approach ensures a thorough assessment of each staff member's performance. Individualized professional development plans will be collaboratively developed between staff and evaluators, focusing on identified strengths and areas for growth. Regular evaluation cycles will be conducted throughout the academic year, promoting ongoing assessment and feedback to support continuous improvement.

Feedback mechanisms within the school will be characterized by constructive, timely feedback provided by the school's instructional leadership team. This feedback will emphasize strengths and areas for improvement using the RELAY coaching model, creating a culture of continuous learning. The school will foster a two-way communication culture, encouraging staff members to actively seek feedback and engage in reflective conversations about their professional practice. Additionally, feedback from multiple sources, including peers, students, and parents, will be considered to provide a comprehensive view of each staff member's contributions.

Celebrating excellence will be a core element of LEAD Southeast Elementary's culture. Recognition programs, awards, and acknowledgments will be instituted to celebrate the achievements and exemplary efforts of staff members. Outstanding contributions will be publicly recognized through ceremonies, awards, and various communication channels, creating a culture that appreciates and celebrates the excellence of its dedicated staff. High-performing staff members may be afforded additional professional development opportunities, leadership roles, or participation in our master teacher program. Through these policies and procedures, LEAD Southeast Elementary aspires to create an environment that not only evaluates and supports its staff effectively but also celebrates their excellence and contributions to the school community.

- i. Describe how the proposed school intends to handle unsatisfactory leadership or teacher performance, including termination, as well as leadership/teacher changes.

Through consistent observations and coaching, our school leaders and network staff will have a great deal of information on each employee's performance within the school. Should an employee not meet the specifics of their job requirement, that employee will be put on a plan of support. The plan of support is designed to create a specific plan of action by both the school leadership team and the employee with the intention of overall improvement in performance. The plan will be designed to help improve the abilities of the employee and will be agreed upon by both the school leader and the employee. The plan of support will be monitored and managed by the HR Team at the network support team of LEAD Public Schools.

Should an employee not meet the goals established in the plan of support, that employee will be dismissed. If that role is a critical position within the school, LEAD Public Schools will seek to find a replacement as soon as possible.

- j. 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.

Three words best describe LEAD performance management: simple, focused, and consistent. We want to ensure that each member of our team is provided with the environment and support they need to be successful in their role, grow their careers, and experience work as a true calling. Integrated with the compensation plan is our focused and consistent performance management approach.

We modified our reward structure to compensate our teachers, not by how many years they have worked, but by their positive impacts on students and schools, evidenced by their consistent performance in and out of the classroom. We provide transparent performance-based compensation that allows excellent teachers to rapidly advance their base pay. Teachers can earn up to 10% base salary increases annually based on their performance. We have ensured our pay structure does not incent top-performing teachers to leave the classroom solely to advance pay; those that truly wish to teach should be able to do so without sacrificing rewards.

Master Teachers at LEAD may make up to \$100,000 annually. Salaries for external hires are based on years of experience, demand for content area, and other factors. We use the guidelines below when making offers for new hire teachers. We often offer signing bonuses to supplement salaries for those who are new to LEAD.

Years of Experience	Proposed Salary
0	\$53,000
1	\$54,000
2	\$55,000
3	\$56,000
4	\$57,000
5	\$58,000
6	\$59,000
7	\$60,000
8	\$61,000
9	\$62,000
10+	\$63,000+

For support staff, pay increases are based on position in range and performance allowing individuals newer to the role to move at a more accelerated pace than those higher in the range. An annual merit matrix will

provide increased guidance based on performance and position in range. Our salary grade midpoints are set to be near the 75th percentile of the national market.

Each full-time employee at LEAD Public Schools is offered a comprehensive benefits package that enhances their compensation package. LEAD pays on average 75% of benefits premiums for our insurance plans including medical, dental, and vision. LEAD provides at no cost to the employee basic life insurance, AD&D insurance, mental health benefits and an EAP. LEAD makes full contributions to TCRS and offers support staff retirement. LEAD offers competitive paid time off to all staff, including up to 80 hours for school year staff members and 16 weeks paid parental leave for primary caretakers.

k. Explain the school's proposed strategy for retaining high-performing teachers.

Our recruitment strategy starts first and foremost with retaining our existing staff. We have revised our Employee Value Proposition to be more competitive in effectively attracting, developing and retaining great teachers. LEAD's Employee Value Proposition is based on five pillars:

Rewards. We provide transparent performance-based compensation that allows excellent teachers to rapidly advance their base pay. Teachers can earn up to 10% base salary increases annually based on their performance. We offer market competitive benefits with 16 weeks paid parental leave for primary caretaker and flexible paid time off. We modified our reward structure to compensate our teachers, not by how many years they have worked, but by their positive impacts on students and schools, evidenced by their consistent performance in and out of the classroom.

Work. Our work is mission-focused and vision-aligned – to ensure every student is ready for college, ready for life. We provide coaching, support, and autonomy. We take initiative and are solutions-oriented. We empower teachers to have a voice in the direction that they want their career to go.

Organization. We are the largest homegrown charter school network in Nashville with a reputation for excellence. Our six schools serve all students through a rigorous academic experience, through both open- enrolled and zone-enrolled schools. We live our ethos - we are committed, courageous, disciplined, self-reliant and we serve others.

People. We build trusting relationships and communicate with caring directness. We celebrate successes and recognize individual and team results. We have a growth mindset and provide opportunity for ongoing learning and individualized development. We listen actively and seek to understand. We are accountable.

Opportunity. We invest in professional development and have a coaching culture of continuous improvement. Teachers and support staff have the opportunity to choose a career path aligned to their goals. We have restructured our staffing models within our schools to include more instructional

leaders. At LEAD Public Schools, we have built a model wherein there is 1 instructional leader for every 6-8 teachers. This allows our coaches to prioritize the development of our teachers through regular, on-going feedback. Additionally, our Master Teacher program allows our highest performing teachers to earn up to \$100,000 base salary solely based on performance and not years of experience/advanced degrees.

Our approach to sustainable organization results begins with a shared purpose. We believe in holding all of our students to high academic standards- and in creating a **joyful, safe environment** where students can accomplish their goals and be proud of their work. We place a high priority on **intentional relationship building** so every student feels connected and known at school. We believe a **growth mindset** is key to developing world-class students who develop the habits and grit to succeed. We have a commitment to **daily excellence** and strive for the best for our students and community.

To achieve the above, we have built an integrated talent management system to assure that we have the right people in the right roles at the right time. This is key to achieving student outcomes at scale and over the long-term. Our integrated approach to talent management was built on evidenced based approaches (McKinsey, Gallup, Center for Creative Leadership, and Towers Watson) and includes four key areas:

1. **Talent attraction and selection** - Sourcing, selecting, and onboarding the right people for the right roles at the right time.
2. **Managing performance and developing talent** - Engaging each member of the team, focusing on performance, quality conversations, and coaching to build skills and capabilities.
3. **Employee value proposition** - Compensation strategy as part of a complete employee value proposition unique to the organization including rewards, work, organization, people, and opportunity.
4. **Building organizational capacity and capability** - Organization structure, role definition with linked and clear accountabilities, effective teams, and solid human resource administration.

While all are important to sustainable organizational results, talent development and effective leadership and coaching are the most critical to achieving our teacher retention goals.

- I. Explain whether the employees will be at-will or whether the school will use employment contracts.

All LEAD Public Schools employees are at-will in accordance with TN State law.

- m. Include a copy of the school's employee manual and personnel policies as Attachment S.
- n. Complete the provided template for Table 4: Staffing Chart to outline your staffing projections.
 - Adjust or add functions and titles as needed to reflect variations in school models.

Table 4: Staffing Chart

Position	Year of Operation					
	Prior to Opening	1 st	2 nd	3 rd	4 th	5 th
Principal	0.75*	1	1	1	1	1
Assistant Principal		1	1	2	2	2
Director of School Operations	0.75	1	1	1	1	1
Instructional Manager		0	1	2	3	4
Teacher (Core Teacher)		7	10	13	16	17
Teacher (Related Arts)		2	2	3	4	4
Interventionist		0	1	1	1	1
Media Specialist		0	1	1	1	1
Substitute		0	0	1	1	2
Exceptional Education Compliance		0	0	1	1	1
Special Education Teacher **		1	2	3	4	4
Paraprofessional		0	0	1	1	2
Counselor		1	1	1	1	1
Student Support Coordinator		0	0	1	1	1
Family & Community Engagement Coordinator	0.75	1	1	1	1	1
Office Manager		1	1	1	1	1
Receptionist		0	0	1	1	1
Total FTEs	2.25	16	23	35	41	45

*In our Year 0, staff members will be hired no later than 10/1 and are accounted for as a 75% FTE.

**We have edited the table required by the TDOE to specify that this line item is solely for Special Education Teachers. ELL teachers are dually certified staff already accounted for in the Teacher (Core Teacher) line item above.

With an anticipated exceptional education rate of 15%, the above dedicated Special Education staff members, plus paraprofessionals, should be sufficient to meet the needs of all ExEd students. However, should an additional staff member be needed, due to student need, we would immediately add that position. See the Budget Narrative for additional information about how our budgeting process allows for such flexibility.

Section 2.5 - Professional Development

In this section:

- a. 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.

At LEAD Southeast Elementary, we understand that excellent teacher professional development is essential for our students' success. At LEAD, we acknowledge that, just like our diverse learners, our teachers also benefit from exceptional professional development. We are committed to providing exemplary training delivered in various formats to engage and develop our team, ultimately leading to the best outcomes for our students.

Professional development begins prior to the school year starting. Depending on their role, staff participate in the following:

- **Leadership Institute**, which trains leaders on best leadership practices and new initiatives while providing collaborative time for setting up the school year;
- **Coaching Institute**, which trains and norms coaching staff on best coaching practices;
- **New Teacher Orientation**, which provides logistical onboarding while orienting new staff to what it means to be a LEAD team member;
- **Curriculum Institute**, which trains instructional staff and provides collaborative and focused planning time for everything from teaching to the rigor of the standard, understanding all elements of the curriculum, employing best practices for supporting diverse learners, establishing a strong classroom culture, and using quality data analysis practices; and foundational literacy training
- **Culture Institute**, where school student support teams learn and practice key culture components of the LEAD structure, including restorative and culturally responsive element; and two weeks of school-based PD, where schools build camaraderie, norm on expectations, learn about the communities they are working with, and prepare for the school year.

In addition to summer professional development, ongoing professional development is provided throughout the year for an additional hour once per week and on professional development days. The latter happens on the same days as MNPS at a minimum and is led by the school or network. The focus of school professional development days differs depending on school needs. Network professional development days may focus on content and/or data, providing structured planning time to do the following:

- Norm on task and performance levels and mastery of focus standards
- Examine how students perform on tasks that mirror the rigor of TN Academic Standards
- Gain insight into student thinking
- Develop skills at analyzing student work and using that analysis to inform instruction
- Collaborate to plan cohesive units and lessons

Coaches are trained on coaching practices prior to the start of the school year and continue to calibrate and norm over the course of the school year.

They engage in targeted support, using the following tools:

- Observation feedback, live coaching, and debrief meetings
- Lesson plan feedback and clinics
- Lesson internalization meetings
- Weekly individual data meetings
- Monthly professional development sessions based on trends

The LEAD TEAM evaluation model is another tool used for professional development and is directly tied to instructional coaching. LEAD Public Schools uses the Tennessee Educator Acceleration Model (TEAM) to evaluate all licensed teaching staff. TEAM-certified school leaders observe teachers at multiple points during the year and score them using the TEAM rubric. Scores are then submitted to state and used in calculating teacher value-added measures. Data is tracked and used to drive professional development and whole school focus and refine individualized coaching goals.

Finally, professional development is a vital component of our strategy to cultivate a strong team of effective leaders. Every summer, all staff managers partake in the network-wide LEADership Institute, a three-day training encompassing performance management, courageous conversations, and leadership assessments. This intensive training at the beginning of the school year guarantees that both returning and new managers have a foundational understanding of leadership within our network. This empowers them to drive transformational results for our students and communities.

- a. Identify the person or position responsible for professional development.

Network Development: Network Support Team NeST

The academic team at LEAD Public Schools takes the lead in spearheading professional development initiatives across our network. The Chief Academic Officer plays a pivotal role in shaping the vision for all professional development efforts. Supported by network department chairs, the team focuses on developing and coaching teachers in areas crucial for academic excellence, including Tier 1 instruction, MTSS, RtI, and Exceptional Education. Additionally, our network data team is instrumental in collecting and analyzing data, providing training, and coaching on utilizing data dashboards to effectively monitor and improve results across the network.

School Level Development: School Leadership Team

At the school level, professional development (PD) is crafted by the school leadership team. Additionally, each teacher receives personalized coaching and feedback from their instructional manager, tailored to their individual needs. This development is centered around school-specific initiatives, programs, and a responsive approach to data and trends. Our goal is to ensure a robust alignment between network-wide and school-level professional development initiatives. Moreover, we emphasize building strong cultural responsiveness among

our staff to empower them in supporting our diverse learning community. Professional development, collaborative Professional Learning Communities (PLCs), and personalized coaching stand as the foundational pillars of our comprehensive development plan.

- b. 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.

The core components of LEAD's professional development plan mirror the elements of the academic plan, ensuring effective implementation. The core components of a rigorous curriculum aligned to Tennessee standards, adaptive learning opportunities for students, vertical alignment wherever possible, and equitable grade-level instruction are established during summer professional development and continue throughout the school year with topics such as the following:

- Standards deep dive in content areas
- Access and equity in content areas
- Specific content preparation and internalization practices
- Effective co-teaching practices
- Just-right scaffolds to support all learners in the classroom
- Learning about the context of English language learners previous schooling
- What WIDA standards look like in practice in each grade level
- The multiple modalities plus data tracking and review
- Access for all in math - meeting needs of all learners, universal design for learning, differentiated instruction, structures for inclusiveness (replicated in other subjects)
- Supporting multilingual learners - annotating word problems to interpret language of math, extensive talking, and writing opportunities, etc.
- Specific training on intervention, differentiated by topic and audience, including progress monitoring training
- Specific training on behavioral interventions (FBAs/BIPs)
- Foundational Literacy Training for all elementary, EL, ExEd, and ELA teachers, regardless of grade levels served

Additionally, to make sure diverse learners' needs are continuously met, the network academic team trains ELL and Exceptional Education teachers directly on the processes and strategies specific to students with disabilities and English language learners. These trainings address implementation of IEPs, discipline of students with disabilities and communication with parents of diverse learners. These trainings take place during LEAD University and Content PD days.

We focus on nurturing social-emotional learning through dedicated professional development (PD) sessions centered around our Be Well curriculum. These sessions encompass fostering connections with students, engaging in restorative conversations with children, and leading CREW activities. As part of our strategy, Adult CREW is a consistent feature on professional development days. This intentional practice allows adults to

experience firsthand what we aim to provide for our students and fosters a sense of cohesive collegial relationships among our staff.

LEAD's robust coaching program reiterates all learning and helps ensure staff are honoring students as individuals while holding them accountable to the rigorous standards being taught and supporting their ability to master the standard through appropriate and timely scaffolds.

- c. Provide a schedule and overview of professional development that will take place prior to the school's opening.

Following charter approval, the leadership team for LEAD Southeast Elementary will dedicate professional learning to ensuring PD supports meet the needs of our elementary teachers and staff. All staff will participate in LEAD professional development prior to the school year beginning, including the following components:

- **Leadership Institute:** Three days focused on giving all people managers, including principals, assistant principals, and instructional managers, a deep dive in performance management, staff development, and how to be an effective manager or others.
- **Coaching Institute:** Two days for all leadership, including instructional managers, focused on best practices for classroom instructional coaching.
- **New to LEAD Orientation:** One day for new hires focused on understanding LEAD culture, history, and HR onboarding.
- **Curriculum Institute:** Three to five days for all staff, tailored to each instructional content area or job title. Sessions are tailored to the unique needs of each small group of staff and includes a deep dive on curriculum for teachers and other instructional staff.
- **Culture Institute:** Three to five days for student support staff, focused on learning classroom management, PBIS, Diversity, Equity and Inclusion, and network expectations for school culture.
- **Diverse Learners' Institute:** One day for exceptional education staff and EL staff, focused on specific instructional practices and compliance issues. Such as training on Functional Behavioral Assessments (FBA), Behavior Intervention Plans (BIP), and other academic and behavioral strategies.
- **School-Based Professional Development:** Seven to ten days - this time is dedicated for school teams to co-plan for the first 30 days of school, prepare their classrooms, and build school team camaraderie.
- **School Emergency Preparedness Training:** School safety training and development encompass various aspects to ensure a secure learning environment. In accordance with TDOE requirements for annual training, LEAD Public Schools adhere to all mandatory reporting and training guidelines. In addition, all schools are required to upload their school emergency operation plans, which covers protocols for weather emergencies, lockdowns, and lockouts through regular drills and preparedness exercises, in Navigate 360 for state and local law enforcement review. All school staff receive training during LEAD University on their schools emergency operations plans, employee expectations, drill cadence, and the school emergency response team's communication protocols during an emergency.

During these 15-16 days, all staff will gain a strong foundation and internalize all components of LEAD Southeast Elementary plan outlined in this application and adjusted based on community needs.

A proposed schedule for the 2025 school year is below:

July 1	New teachers provided with pre-work to be completed by the start of Curriculum Institute or Culture Institute	New Teachers, New Instructional Support Staff, and New Student Support Staff	Chief Academic Officer + Network Academic Team
July 8–10	LEADership Institute Strengths-based leadership training for network and school-based leadership	Principals, APIs, APSs, IMs, NeST Directors/Managers	HR - Director of Organizational Learning
July 11	LEAD Coaching Institute Focus on best-practices in instructional coaching	Principals, APIs, IMs	Director of Academics + Network Academic Team
July 11-12	New Employee Orientation • Introduction to LEAD, LEAD mission, vision and values, employee expectations • Network policies and procedures	Teachers and Support Employees New to LEAD	HR
July 15	Morning: School-Based Kick-Off Afternoon: Network-Wide Kick Off	All School-Based and NeST Employees	School and NeST Leaders
July 16-19	Curriculum Institute • Focus on common curriculum for each core content area	New and Returning Teachers, New and Returning Paraprofessionals and Education	Chief Academic Officer + Network Academic Team with Assistance From School IMs and

	• Meeting needs of diverse learners • Planning for strong start to the school year • Cultural awareness training • Differentiated for new and returning teachers	Assistants	Master Teachers
July 16-19	Culture Institute • Focus on common culture and behavior procedures and practices • Planning for strong start to the school year • Cultural competency training	New and Returning SSCs, DOCs, School Counselors, APSs	Director of Student Support
July 22	Diverse Learners Institute Focus on ExEd and EL specific instructional practices and compliance issues	ExEd, EL Teachers, IMs, and Support Staff	Director of ExEd Director of EL
July 22- July 26	School-Based PD	All School Staff	School Leadership
July 29-Aug. 2	School-Based PD	All School Staff	School Leadership
August 5	School-Based PD	All School Staff	School Leadership

August 6	First Day of School

- d. Describe the training that will be provided to all staff on the topics of diverse, inclusive and culturally relevant pedagogies.

LEAD emphasizes culturally responsive practices among staff, expecting staff to approach students and families with empathy and an asset-based perspective. There is currently a network-wide committee working on how to increase the cultural-responsiveness of staff. LEAD is prioritizing expanding practices by focusing on the following:

- Incorporating professional development that is led/supported by members of the communities surrounding our schools including parents and students. This would be quarterly and be continually referenced throughout the year
- Ensuring 100% of staff have access to and know how to use a phone-in interpretation service to maintain communication with families
- Having a community calendar managed by the family engagement coordinator for each greater school community from which we encourage staff to engage in events
- Continuing to offer sessions about various subgroups to support our staff knowledge of how to provide the best educational experience for ALL students. For example, during the most recent summer professional development session, staff participated in a variety of culture sessions on students from countries in the Northern Triangle.

Professional development sessions also incorporate the needs of diverse learners to ensure an inclusive educational environment. Sessions in the past included Data Driven EL Instruction, Supporting Multilingual Learners in Content Areas, and Diverse Learners and HS ELA Instruction.

- e. Describe the plan to cultivate future leadership capacity.

In our commitment to transforming underperforming schools, we recognize the pivotal role that effective leadership plays in fostering rapid and sustainable improvement. Our leadership development plan for school and executive leaders is designed around leader competencies to ensure our leaders are equipped with the skills and support needed to drive dynamic results for students.

In 2018 LEAD began a comprehensive talent strategy to evaluate and develop leaders and calibrate leadership talent across our network on an ongoing basis. In order to support growth and sustainability of academic results, we complete talent calibration and succession planning twice a year

for all network and school leadership from the instructional manager level all the way to the CEO. See Attachment S for more detailed information regarding our comprehensive approach to leadership development.

LEAD’s talent calibration and succession planning process engages school principals and network executives in a review of performance, progress towards goals, and development towards LEAD’s Leadership Competencies. The goal is to evaluate role readiness and identify necessary development areas for leaders across the network. Through this process, leaders are identified as successors and are assigned leadership development appropriate with their level of performance and potential. CEO succession planning occurs twice per year and involves the CEO and the LEAD Public Schools Board of Directors. This process also includes identification of a current interim successor, identified as LaVoe Mulgrew, in the event there is an emergency or if LEAD’s current CEO is unavailable.

Our unique leadership development and talent strategy includes customized 360 feedback and executive coaching for six months. This allows us to develop current leaders while building a pipeline of future leaders all grounded in our unique leadership Ethos. Our leadership development and talent strategy ensures a smooth leadership transition and allows for high potential staff to move throughout our network of schools. Since the inception of this program, LEAD has retained 75% of our leadership with 30% receiving promotions within our network. Most significantly, five of our six current principals were internally developed and promoted. We believe this process of identifying and developing leaders will significantly impact our success and sustainability in the long term.

- f. Explain plans for differentiating professional development for different groups of teachers, such as new versus experienced teachers.

Differentiated Professional Development Framework

In our commitment to fostering excellence in education, our LEAD proposes a dynamic and differentiated approach to professional development, recognizing the diverse needs of our instructional and support roles. Our strategy encompasses a combination of all-staff sessions to establish school-wide goals, expectations, and a cohesive adult culture, along with targeted support for new teachers aimed at rapidly enhancing their capacity for effective classroom management and lesson delivery.

Session	Purpose
All Staff Sessions	Regular all-staff sessions will serve as foundational touchpoints, ensuring alignment on <i>school-wide goals, expectations, and the establishment of a cohesive adult culture</i> . These sessions will provide a

	shared understanding of our mission and vision, fostering collaboration and a unified approach to achieving our educational objectives.
New Teacher Support	Tailored to meet the needs of new teachers, our professional development plan focuses on the cornerstones of beginning teaching: <i>establishing a safe and supportive classroom climate, lesson planning and delivery</i>
Professional Development Scope and Sequence	Our professional development trajectory follows a comprehensive scope and sequence, guiding our team through essential aspects of effective teaching. This sequence includes components such as <i>classroom management, lesson planning and delivery, formative assessment, data analysis, and diverse learning support</i> . This structured progression ensures that educators acquire a holistic set of skills to excel in their roles.
Differentiated Breakout Sessions	We will conduct differentiated breakout sessions during full professional development days and/or Professional Learning Communities (PLCs). These sessions will be organized based on individual skill levels and goals aligned to the teacher scope and sequence rather than grade/content. This allows teachers to focus on specific aspects of their pedagogical growth. Whether experienced or novice, educators will benefit from targeted support tailored to their unique needs and aspirations

Our team is committed to providing a tailored professional development experience that caters to the specific needs of our dedicated team. Through this differentiated approach, we aim to cultivate a community of educators who are not only aligned with our school's mission but are also equipped with the skills and knowledge necessary to provide an exceptional learning experience for all students.

- g. Explain how the proposed school will provide orientation to teachers that are hired mid-year.

Teachers that are hired mid-year are provided onboarding from the network and school-based teams. Each new staff member is provided an individualized onboarding plan that includes asynchronous video sessions adapted from summer PD, meetings with key stakeholders, guided practice with technical aspects of the job like lesson internalization, and classroom observations. Instructional staff have lessons modeled and move to co-teaching before they are expected to independently lead teach. All new staff receive heavy, priority coaching and frequent check-ins.

We go beyond initial training by establishing vital connections within the school community. Each new teacher is paired with a grade level chair or another experienced senior team member, forming a mentorship relationship that offers ongoing guidance and support. This intentional pairing serves as a valuable resource, providing new hires with a go-to person who can offer insights, answer questions, and share institutional knowledge.

Section 2.6 – Insurance

Charter schools must have appropriate insurance coverage. Applicants should check with their district to determine the necessary coverage amounts. As Attachment T, please provide the following:

- a. 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.
- b. 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).
- c. *Note: if the proposed school intends to have school athletics, additional liability coverage will be required.*

See attached for the letter of insurance coverage, which includes types and amounts of insurance held.

Section 2.7 – Transportation

In this section:

- a. How will you transport the students to and from your proposed school daily, if applicable?

LEAD currently offers, and will continue to offer, transportation to its students by contracting services through our third-party provider in accordance with our multiyear transportation contract through Grayline. Grayline has been a partner to LEAD, and other charter operators, for many years and is prepared to expand its services, including hiring new drivers and procuring more buses, to grow alongside our organization. In addition, Grayline has extensive experience transporting students at the elementary level. All



students living within the geographic zone will have access to transportation in alignment with our LEAD transportation policy. Transportation routes will largely mirror that of our existing middle school routes and stops, but adjusted for time. All routes are compliant with state mandated route times (TCA 49-6-2105). Special transportation is also provided if necessary to students in alignment with their IEP and the additional cost of an exed route, as well as a trained monitor, is included in budget assumptions. LEAD also provides transportation services to homeless students in compliance with McKinney-Vento regulations and ensures transportation for foster students is in compliance with all state rules and regulations. All transportation services are overseen by LEAD's COO, network director of operations, and each school's director of school operations with safety as our top priority.

- b. 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.

LEAD currently offers, and will continue to offer, transportation to extracurricular, athletic, and field trips through our third party provider in accordance with our multi year transportation contract. Expenses related to this cost are included within our budget (see appendix) based on costs outlined in our transportation contract and our experience with other schools.

- c. Describe how the transportation vendor will be selected or, in the alternative, how the

proposed school will provide transportation.

See response to (a) above.

d. 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

See response to (a) above.

e. If you are not providing transportation, describe how students will get to and from your school and how the school will address equity and access for students in the absence of a comprehensive transportation plan.

Section 2.8 - Food Service

In this section:

- a. Describe the proposed school's proposed food service plan and include the following:
 - a. A clear description of how the proposed school will offer food service to the students
 - b. How the school will comply with applicable district, state, and federal guidelines and regulations.
 - c. Describe how the school food service plans meet the needs of low-income students.
 - d. 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).
 - e. Describe how the food service vendor will be selected or, in the alternative, how the proposed school will provide meals in-house.

LEAD adheres to all school nutrition guidelines articulated in the Tennessee School Nutrition Act, T.C.A. 49-6-2301—2307, as well as federal guidelines such as the National School Lunch Act and Child Nutrition Act and is committed to providing all students access to healthy and nutritious meals. LEAD currently contracts with Metro Nashville Public Schools for all student nutrition needs and plans to continue that partnership for as long as possible. If the application to open an elementary school is approved, LEAD will reach out to MNPS to discuss a nutrition contract. It is our intention to seek a nutrition contract with the local LEA, if possible, and seek a private contractor as a secondary option. Collecting free-and-reduced-price lunch information is currently the responsibility of the MNPS nutrition department. Under the current community eligibility provision of MNPS, no student is ever charged for school meals. Should we need to find an alternate vendor for food nutrition services, we would use this vendor to ensure timely filing of all necessary documentation. If LEAD Southeast Elementary was unable to participate in Community Eligibility Provision, we would rely on our existing infrastructure to support families in collecting registration paperwork to ensure that all families are included in the collection of free-and-reduced-price lunch information.

LEAD Public Schools has already established a relationship with the Healthy School Food Collaborative. If LEAD were no longer able to contract nutritional services through MNPS, or were to expand beyond Davidson County, we would partner with HFSC to run an RFP for food service providers and self fund our own food service program. Many local charter operators use SLA food services and we would encourage them, and similar vendors, to respond to our RFP.

Section 2.9 - Additional Operations

Technology:

- a. List the technology that will be required to meet the academic and operational needs of the proposed school.
 - i. 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.

Our mission, centered on preparing students for life, necessitates the strategic integration of technology essential for the 21st-century workplace. By outfitting our school with robust technology, we aim to cultivate skills crucial for student success, streamline tasks for our dedicated staff, and ensure digital access to customized support and resources.

Skill Building for Students: We will equip students with the technological skills and literacy required for success in the rapidly evolving 21st-century workforce.

Streamlined Work for Staff: Technology facilitates efficient and effective workflows for staff members, enhancing productivity and enabling them to focus more on personalized instruction and support.

Digital Access to Support and Resources: This provides students and educators with seamless digital access to tailored support, educational resources, and collaborative platforms, fostering a dynamic and responsive learning environment.

This mission-driven technology integration is integral to our commitment to Ready for Life, ensuring that our school remains at the forefront of preparing students for the challenges and opportunities they will encounter beyond the classroom.

Technology	Purpose and Intended Use
Chromebook	Provide students with Chromebooks to enhance personalized learning, collaboration, and access to educational resources.
Macbooks	Empower educators with reliable technology tools, such as MacBooks, to facilitate effective lesson planning, assessment, and instructional delivery.
Projectors and Interactive Whiteboards	Facilitate dynamic and interactive lessons by providing teachers with projectors and interactive whiteboards, enhancing visual and hands-on learning experiences.
Copier and Printers	Support the production of instructional materials, worksheets, and creative projects, including large-format posters, to enhance classroom engagement and visual learning.
Special Technology (iMac, piano)	Provide technology tools, such as small piano keyboards or multimedia equipment, to related arts teachers, enhancing creativity and integration of technology in art, music, and other related subjects.
Health and Safety	Ensure a secure and monitored school environment by implementing safety technologies, including surveillance cameras and a family sign-in system, promoting the well-being of students and staff.
Inventory System	Streamline the management of educational materials, textbooks, and resources through an efficient inventory system, ensuring accessibility for both teachers and students.

- b. 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.

Our commitment to a robust technology infrastructure at LEAD Public Schools is paramount to fostering an environment that empowers both students and teachers. Maintaining a 1:1 student-to-computer ratio through the acquisition of Chromebooks, strategically stored in mobile charging carts, ensures equitable access to digital resources. Each classroom is equipped with essential tools such as projectors, document cameras, speakers, and in some cases, interactive whiteboards, promoting interactive and engaging learning experiences.

Our investment extends to our dedicated teaching staff, each equipped with their own dedicated computer, ensuring seamless integration with classroom technologies. LEAD places a high priority on reliable printing resources, with large-volume copiers and printing hubs strategically positioned throughout the academic floors, supplemented by smaller convenience printing locations.

To support our commitment to online assessments, including state-mandated testing, we partner with Technology Labs, an IT vendor, ensuring that all hardware is meticulously prepared for student use. The network operations team oversees the hosting of our data infrastructure using Google Cloud

technology, allowing for efficient student and staff rostering to hardware and software resources.

Our strong operational team and collaborative partnership with Technology Labs further guarantee the continuity and reliability of our technological framework. As we look ahead, this robust technology infrastructure not only aligns with our mission but also ensures that LEAD Public Schools remains at the forefront of providing an enriched and technologically empowered educational experience for our entire school community.

b. Student information management:

- a. 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.

LEAD Southeast Elementary will utilize the MNPS SIS, Infinite Campus and has already built the data infrastructure necessary to ensure that the SIS is supporting other critical data systems. Data and technology is overseen by our director of data, who reports to the Chief Strategy Officer, and is also supported by our data engineer. LEAD Public Schools follows all FERPA compliance and state regulations regarding student information. Every staff member at LEAD signs the LEAD Employee Handbook at the beginning of their employment. The handbook highlights FERPA compliance regulations. All LEAD employees are required to document their agreement to abide by all FERPA regulations by signing the handbook.

c. School health and nursing services: per Tenn. Code Ann. § 49-1-1002

- a. Describe your plan for compliance with the Coordinated School Health Program, including any plans to hire a school nurse.
- b. Include who at the proposed school will supervise the school nurse and his/her role in ensuring compliance with health regulations.

LEAD follows all Coordinated School Health Program guidelines. LEAD partners with a registered school nurse to support each LEAD school in ensuring that all students receive high-quality care. We utilize contract nursing services (RNs and LPNs) through Angel Healthcare to support the nursing needs at our schools. LEAD'S current model has one school nurse per school on a full time basis who works directly with the schools administrative and operations team to meet the healthcare needs of students. Our nursing service provider provides ongoing training for its nurses in accordance with state guidelines and is able to provide additional health services and substitute coverage, as needed, ensuring that each campus has access to health services on a daily basis. Our nurses are the primary points of contact for all first aid, health evaluation, and the dispensation of medication. Each school office manager is managed by a director of school operations, who reports directly to LEAD's chief operating officer, thus ensuring that the office manager maintains all Coordinated School Health Program guidelines. LEAD also partners with providers like Well Child and TEAMSmile to ensure that all students have access to high-quality preventive health care. Each school has at least two individuals, including an office manager, who attends annual training from Metro Nashville Public School's for Unlicensed Personnel on how to administer medication and administer first aid.

d. Safety and security: executive order, etc.

- a. 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.
- b. What will be the process and timeline for creating a school crisis plan?

As part of its management policies, LEAD implements a comprehensive set of health, safety, and risk management policies in compliance with District Standard Operating Procedures that addresses the following:

- Policies and procedures for responses to disasters and emergencies
- Policies relating to blood-borne pathogens
- Policies relating to the administration of prescription drugs and other medicines
- A policy establishing LEAD as a drug, alcohol, and tobacco free workplace

All faculty and staff will undergo the standard criminal background check and fingerprinting process as has been the case with the other LEAD campuses. The applicants will be required to provide a full disclosure statement regarding prior criminal records. All staff will be required to produce documents for U.S. employment authorization. For medical safety, all staff will have medical clearance, including proof of medical examination and any necessary immunizations or tests (TB for example).

Each of LEAD's campuses has a dedicated full-time employee, the director of school operations, who manages all safety and security responsibilities on a day-to-day basis. Their responsibilities include ensuring that the campus crisis plan is updated at all times, that staff are fully trained on crisis response, maintaining a clean, safe and secure facility, overseeing our outsourced school resource officer and supervising the school nurse. LEAD contracts with a licensed third party security vendor to provide a SRO, if required. In addition, each school develops a strong relationship with its local police precinct to receive support, if necessary.

LEAD Public Schools currently consult with Reese Protective Services who provides first and second shift armed security guards for all of our campuses. Our standard security profile includes one first shift armed guard per school and one floating second shift armed guard. We also adhere to all state requirements for the posted on all security messaging regarding searches, weapons, and the possession or use of illegal substances. In addition, each of our campuses utilizes the Raptor visitor badging system, which provides a printed visitors badge and checks against the sex offenders registry for all parents and visitors. Our schools are also equipped with locking access control systems, intercom and camera systems as an additional layer of security for our campuses.

LEAD has crisis management plans at each of our current schools. Once a facility/location is finalized for this school, the director of network operations will use LEAD's template crisis management plan and customize it for the location. This plan will be completed by mid-July, allowing for trainings to occur at new staff professional development at the end of July. Drills will then occur in early August prior to students arriving. LEAD will then follow the required monthly drill timeline with students.

e. School maintenance:

- a. Discuss the plan for school maintenance, including maintenance staff or plans to contract for maintenance services.
- b. Describe any additional operations, as applicable.

LEAD will mirror its current practices for facilities maintenance in any future schools. LEAD currently contracts out all custodial services to include nightly deep cleaning and day time porter service. LEAD will again go out to bid to procure these services the spring before the founding of the school. LEAD has an established contract with an external vendor who responds to general maintenance issues, HVAC, electrical, and plumbing services. Anything outside of our typical contract is quoted in compliance with network financial procurement policy.

Section 2.10 - Charter Management Organization

Section 2.10 is REQUIRED for applicants intending to contract or partner with a charter management organization

In this section, please detail:

- a. The name of the CMO, if known, and evidence of its educational and management success;
- b. Describe the scope of specific resources, service, or set of services that the Charter Management Organization (CMO) will provide for the school to support operation and/or management.
- c. Selection process and criteria;
- d. 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;
- e. How performance of the CMO will be measured, including any deliverables;
- f. Conditions for renewal and termination of the CMO agreement;
- g. Any monetary obligations of the CMO agreement; and
- h. Include a copy of the CMO agreement as Attachment U, 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

Not applicable.

Section 2.11 – Network Vision, Growth Plan & Capacity

- a. Describe the network’s strategic vision, desired impact, and five-year growth plan for developing new schools in Tennessee. Include the following information:
- proposed years of opening;
 - number and types of schools;
 - any pending applications;
 - all currently targeted markets/communities and criteria for selecting them; and
 - projected enrollments.
 - If the existing portfolio or growth plan includes schools in other states, explain specifically how Tennessee fits into the overall growth plan.

LEAD’s strategic vision is based on helping create a city where equity of educational opportunity exists for all students – which is, essentially, a great school for all families that is close to home. We pursue this vision through a commitment to partner with the local district, Metropolitan Nashville Public Schools (MNPS), and the Tennessee Achievement School District (ASD) to operate our existing charter schools, provide pathways to high schools for all our students, and provide opportunities for more students to succeed in college and in life. Our partnerships, the schools we currently operate, and the school we are proposing will help us provide additional high performing seats close to where the families we serve live.

LEAD Public Schools opened its first charter school in 2007 and in 2014 graduated its first senior class with 100% of graduates being admitted to a four-year college. Between those two milestones, we opened three additional schools, including the first district/charter turnaround school in state history as well as the only two ASD schools operating in Nashville. We have also opened one additional lottery charter school, LEAD Southeast Middle and High School.

Desired Impact

The achievement gap gets the most attention, but LEAD believes the real issue is the opportunity gap – the opportunity for each child to attend a high-quality school that prepares them for college and life. LEAD is committed to being part of the solution to Nashville’s opportunity gap. By replicating our success with additional schools in the neighborhoods we already serve can we meet our commitment to help Nashville prepare its students to be ready to succeed in college and in life. By creating high-quality options for elementary and middle school students, we are ensuring those students have a path to succeed in high school, and ultimately, their postsecondary pursuits.

Targeted Communities

LEAD is currently focused on serving students in North, Central, and Southeast Nashville, with a focus on building a K-12 pathway for each community we currently serve. Our impact in our current communities is limited by only serving families from grades 5-12, and in some cases, only serving students for middle school. Our families have told us that they want their students, and their siblings, to be able to have a LEAD option throughout their school experience. Over time, we plan to create a K-12 continuum within each community we currently serve. This will

allow us to have better prepared incoming students and deepen our existing relationships, presence, and impact in our current neighborhoods.

Five Year Growth Plan

Additional growth in LEAD schools will focus on the existing communities we already serve. In the next five years, we intend to build out our K-12 continuum. In addition to our existing six schools, we plan to add LEAD Southeast Elementary and LEAD Cameron Elementary to provide needed feeders to their respective middle schools. In January 2023, LEAD Public Schools was awarded a contract by the Achievement School District to open additional turnaround schools in the 2024-25 school year. In September 2023, LEAD was notified by the Achievement School District of the district's intent to delay the openings of these schools due to the delay in release of school accountability results. The number of schools, related enrollment, geographic zone and opening timeline will ultimately be determined by the ASD.

As our focus is deepening existing relationships in the community, LEAD does not have or plan to open schools outside of Tennessee.

- b. Provide evidence of organizational capacity to open and operate high quality schools in Tennessee and elsewhere in accordance with the overall growth plan. Outline specific timelines for building or deploying organizational capacity to support the proposed schools.

LEAD has already completed many initiatives to ensure it is prepared for growth. First and foremost, LEAD has spent the past three years refining a process to ensure a robust pipeline of talent. (A more detailed outline of our approach to leadership development may be found in the Appendix under Additional Information.) In the 2019-20 school year, LEAD launched its Employee Value Proposition and talent development initiative and implemented an innovative performance-based compensation model for all staff. In addition, LEAD provided executive coaching for all school and network leaders, including a 360 feedback process. LEAD has implemented a talent calibration review for all leadership positions with a focus on succession planning and development of future leaders. In 2022, LEAD transitioned all school-based instructional coaches to instructional managers. The instructional manager role allows for direct supervision and coaching of teaching staff and creates a new pipeline of 25 future school leaders. Most recently, LEAD has expanded its human resources team by hiring a director of HR and director of organizational development, as well as doubling recruiting staff.

As part of the succession planning process, LEAD leadership analyzes the readiness of each current and future leader to take on additional leadership roles. Based on the most recent talent calibration, the current projected internal talent ready for leadership roles by 2024-25 includes three principals, nine assistant principals of instruction, and six assistant principals of students. This strong internal pipeline may also be supplemented by external hires, if needed.

In addition to our human capital strategy for the network, LEAD has made substantial investments in building a strong elementary launch team. Not only does this ensure the capacity and expertise to successfully design and launch future elementary schools, but it also ensures that focus is not taken away from our existing

schools as we look to future school growth. See section 1.1 above for a detailed list of elementary team members.

Another key element of preparing for growth has been to largely standardize the LEAD model. Over the past three years, LEAD has added additional resources to the network academic team to codify academic curriculum across LEAD schools. We have made significant investments in people and time to standardize the approach to each instructional content area, as well as support for MTSS, exceptional learners, and English learners. As part of this initiative, LEAD has built and standardized core intervention models for reading. Beyond the academic model, LEAD has also standardized many areas of its operations procedures, including school culture, school handbooks, front office protocols, and communication platforms and expectations across all LEAD schools. This systemization allows LEAD staff a “ready to launch” playbook to quickly add on additional schools.

Finally, LEAD has prepared the financial and operational supports necessary to support additional schools. This includes developing strong vendor relationships with outsourced transportation, facilities maintenance, and janitorial services with larger vendors who can scale as we grow. LEAD has a strong balance sheet and cash position to have the flexibility to make strategic investments for growth without the reliance on philanthropy. At the same time, LEAD has built solid relationships with networks of donors who are committed to supporting growth work. LEAD has added grants-specific staff on the finance team and adopted a grants tracking system that has given it a proven track record of maximizing public grant opportunities including the Charter School Programs Grant.

- c. If applicable, list any schools that were previously approved by this or another authorizer, but which failed to open or did not open on time, and explain the reasons for the failure or delay.

LEAD Public Schools has never failed to open an authorized school.

In 2011, LEAD was granted a charter agreement from MNPS to open LEAD Southeast Middle School in 2012. At the same time, LEAD was awarded the opportunity to turnaround Brick Church Middle School under the Achievement School District. As a result, LEAD management chose, in partnership with MNPS, to delay the opening of LEAD Southeast Middle School, by one year, so as to focus our attention on turnaround work in 2012, and then on opening LEAD Southeast Middle School in 2013. LEAD Southeast Middle successfully opened in 2013 with both grades 5 and 6 in order to match the initial grade and enrollment growth proposed in the charter agreement.

In January 2023, LEAD Public Schools was awarded a contract by the Achievement School District to open additional turnaround schools in the 2024-25 school year. In September 2023, LEAD was notified by the Achievement School District of the district’s intent to delay the openings of these schools due to the delay in release of school accountability results.

- d. If applicable, discuss the results of past replication efforts and lessons learned – including particular challenges and how you have addressed them.

LEAD Public Schools (LEAD) has successfully launched LEAD Academy, LEAD Cameron, LEAD Southeast Middle and High School (authorized by Metropolitan Nashville Public Schools - MNPS), LEAD Brick Church, and LEAD Neely's Bend (initially authorized by the ASD). The LEAD staff and Board of Directors recognize the challenges of planning additional campuses and are committed to identifying the needed resources to create the new schools, all of which draw upon past experience and a proven planning development process that includes leadership identification, pre-feasibility assessments, community outreach, student outreach, and instructor recruitment. Our past replication efforts have been challenging but successful. Our commitment to continual learning and innovation has served us and our students well as we ensure we are getting better as we get bigger and are becoming more effective as we achieve scale.

We have encountered a number of challenges over the years and have learned from each of them. The three primary challenges we have encountered in our replication efforts are time, facilities, and talent. LEAD Cameron Middle had nearly a full year of planning, and our most recent turnaround schools had much shorter timelines. Short startup timelines make it difficult to conduct the broadest possible talent searches and limit the amount of community outreach we can do in advance of a school launch. Despite this challenge, our schools have all had successful startups, which is an organizational competency we will leverage in future school replication efforts. We are addressing the time challenge by beginning our community outreach and staff hiring activities well in advance of charter approval. In addition, we have developed a team of exceptional functional leaders (academic, operations, finance, fundraising, and communications) that are all closely involved in the startup of any new LEAD school, giving us tremendous startup capacity. While this has a significant cost, we believe it is the right use of resources to appropriately plan and launch a new school and substantially addresses the challenges of short timelines between charter approval and the beginning of school.

Another challenge we have faced as we have expanded to serve more students is the identification of permanent, adequate facilities. Our first school, LEAD Academy, found a home at St. Vincent but it was too small to enroll all of our students as we grew – creating financial challenges as well as enrollment limits that kept many families from accessing a LEAD education. LEAD Cameron Middle is an excellent building location, but has yet to receive the capital improvements it deserves as the third lowest rated building in the district's portfolio. In fact, the building was planned for improvement in 2016 but was removed from the capital budget in both 2016 and 2017. We continue to provide a high-quality education at Cameron for our students despite the substandard facilities and continue to seek public support for facilities improvement. Prior to writing the charter application and launching LEAD Southeast Middle and High School we sought the district's guidance on the most beneficial location for the school. We were asked to locate the school in southeast Nashville and have done so – another example of our collaborative approach to serving students in Nashville – by purchasing and creating a new public school facility. This school has received no public funding for facilities and we are providing a high-quality public school (a 2015 Reward School) to alleviate overcrowding at no cost to the taxpayer. All facilities costs are borne by philanthropy or out of the per pupil operating budget. The challenge of securing adequate facilities remains difficult, yet we have shown that LEAD can resolve these issues with creative partnerships or individually by purchasing facilities.

Additionally, and similar to the district and other schools across Tennessee, we are always looking for great

teachers and leaders. This is a national challenge, and one that we are addressing by creating a robust LEAD Employee Value Proposition, including significant teacher training and leadership development pathways. LEAD has created a three-week summer teacher training institute, LEAD University, that all staff participate in and that is structured to address teacher needs at the rookie, intermediate, and experienced level.

- e. Discuss the greatest anticipated risks and challenges to achieving the organization's desired outcomes in Tennessee over the next five years and how the organization will meet these challenges and mitigate risks.

LEAD's vision of educational equity and the opportunity for each student to attend a great school is not without risks and challenges. The table below lists the greatest anticipated risks and challenges and how we will meet or mitigate them.

Risk	Assessment of Risk	How to Mitigate
Academic deficits of incoming students	High (Low if granted elementary charters)	Our students continue to come to us with significant academic deficits. These challenges are present across the district and not just in LEAD schools. Our ability to dramatically grow our students is a strength, but we have seen no improvement in the academic readiness of our incoming students. To address this challenge we are expanding our focus on intervention programs to address incoming academic deficits, as well as to create a pipeline of elementary feeder schools in which academic progress may be multiplied across the elementary, middle, and high school experience of a single student.
Securing adequate staff and leadership talent in an increasingly competitive market	Low	LEAD has built a LEAD Employee Value Proposition and talent brand that is very successful in attracting, retaining talent, and developing school leaders. We have also invested significant resources in staff training and leadership development which includes 360 feedback and executive coaching for all school based leaders. While we value hiring excellent experienced teachers, we have developed an internal training program to quickly develop more inexperienced teachers. Growth and culture are crucial, as the best talent will seek leadership opportunities with innovative organizations that are known for a strong staff culture. LEAD has a successful track record of hiring and retaining teachers and already has seen significant interest in prospective elementary certified teachers as a result of the elementary leadership already hired within the LEAD network.

Securing adequate facilities	Medium to High	Students and teachers all deserve to work in a high-quality facility, yet those remain difficult to find in low-income areas in Nashville. We have demonstrated success in identifying facilities through partnership, lease, or purchase and expect to continue to utilize all three strategies in the future. LEAD has already launched six schools, all of which had facilities ready to go on Day 1 of school opening. LEAD has built a significant cash balance and lending partnerships to ensure adequate financing for future facilities. In addition, LEAD has already begun searching for facilities, utilizing its existing relationships with facilities brokers, architects and contractors.
Time	Medium	We have found that longer startup timelines correlate with better quality staff and more effective school startup processes. We are looking to the future and making investments in school development far in advance of charter approvals. To address time constraints, LEAD has hired a proven elementary team in advance of charter approval. LEAD is also already executing on key elements of its start up plan (see the Start Up Plan in the Appendix), all in advance of charter approval.
Student enrollment	Medium	Overall district enrollment has declined over time and is decreasing more rapidly in chronically underinvested communities. Schools must maintain a minimum size in order to fund the school services that students need. However, LEAD is unique in that we have adapted our core model to respond to both large and small schools. We also have a strong enrollment team and plan for local outreach that will result in families choosing their neighborhood school. New schools are targeting communities in which the student population is stable or growing. LEAD has already begun its family engagement and student recruiting initiatives in order to secure a strong year 1 enrollment (see Recruitment section for details).
Student mobility	Medium	Strong school culture and academic success are the best ways to address mobility, but for many families their personal circumstances still produce mobility. LEAD is one of the only charters to operate turnaround schools, which experience higher mobility due to primarily serving a neighborhood zoned school. As a result, LEAD has built expertise in, and developed an academic, cultural and operational model that supports

		families who enter our schools mid-year. Our elementary schools will be fresh-start with larger geographic zones, and as a result, will likely experience lower student mobility; however, LEAD stands ready to provide the student onboarding and intervention support to address student needs even in the middle of the school year, just as we do for our other schools.
Community outreach and impact	Medium	New schools require a commitment to outreach and community support for long-term success. By focusing on communities where we already have a presence, we are able to expand our impact and utilize existing relationships to share the opportunities our schools provide to students.
Local, state, and federal funding	Low	The new TISA funding program has resulted in increased funding to our schools, as we serve a disproportionate number of high needs students. However, the change in funding is bringing greater uncertainty. In addition, we have raised significant unrestricted dollars to assist in mitigating fluctuations in revenue.
Startup funding	Low	Start-up funding is essential to funding a Year 0 planning year. We have mitigated this risk with raising unrestricted dollars to invest in new school growth. We have also developed expertise in applying for, receiving and managing several public start-up grants, including CSP (Charter School Programs) funding.

f. Provide, as Attachment V, the network's most recent annual report.

Section 2.12 – Network Management

- a. Identify the network's leadership team and their specific roles and responsibilities.

Our network's leadership team is comprised of the following individuals:

Chief Executive Officer: Dwayne Tucker. The CEO is ultimately responsible for achieving the performance outcomes, including academic outcomes, outlined in each of our schools' charter agreements. The CEO is also responsible for day-to-day operations of the network, including fundraising activities, community outreach, external partnerships, government relations, strategic planning, and public relations. He performs other duties as may from time to time be prescribed by the Board of Directors and serves as an ex officio member of the board.

The following roles report to the CEO, serve on the executive leadership team, and lead various aspects of the network's operations.

Chief Academic Officer: Mary Laurens Minich. The CAO is responsible for teaching and learning, academic design and model consistency, curriculum and instruction, assessment and data, teacher effectiveness, coaching and professional development, special education, and English language learner services.

Chief Human Resources Officer: Nic Frank. Responsibilities include talent strategy, talent recruitment, staff retention, leadership development/succession planning, employment experience, compensation, employee benefits, HR policies, staff surveys, and data analysis.

Chief Operating Officer: Tony Majors. The COO is responsible for day-to-day operations of the network specific to campus operations, directors of operations, transportation, food service, facilities management, real estate, safety and crisis management, and risk management.

Chief Financial Officer: Ashley Montgomery. The CFO is responsible for finance and budget, purchasing and internal control, financial modeling and analysis, payroll/benefits, federal grant management, capital expenditures, vendor relations, audit/tax reporting, and strategic planning.

Chief Strategy Officer: Adrienne Useted. Responsibilities include strategic planning, annual planning, charter authorization, school growth, compliance and data.

Chief Development Officer: Eloise Alexis. Responsibilities include fundraising strategy, grant writing, event management, donor communication, non-federal grant management, stakeholder relations, annual report, and tours.

Director of Enrollment & Recruitment. Responsibilities include family engagement, community engagement, student recruiting and enrollment.

Director of Communications: Jenny Sawyer. Responsibilities include public relations and communication strategy, community engagement and advocacy, crisis management, website, social media and newsletters, messaging materials, events, and tours.

Head of Schools: Ricki Gibbs, LaVoe Mulgrew and Tait Danhausen. Responsibilities include managing and developing effective principals in all aspects of their work, so they in turn can implement the LEAD academic and cultural models. Heads of school are responsible for all aspects of academic performance, school operations, and school budget for the schools they manage.

- b. Provide, as attachments, the organizational charts for Year 1 network as a whole (including both network management and schools within the network) as Attachment W; Year 3 network as a whole as Attachment X and Year 5 network as a whole as Attachment Y.
 - The network organization charts should clearly delineate the roles and reporting structure of the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the schools.
 - If the proposed school intends to contract with a CMO, clearly show the CMO's role in the organizational structure of the proposed school.

See attached for Attachments W, X and Y. We do not anticipate any changes to our organizational structure between Years 1, 3 and 5.

- c. Explain any shared or centralized support services the network will provide to schools in Tennessee, including the cost of those services, how costs will be allocated among schools, and specific service goals.
 - How will the proposed school measure successful delivery of these services?

LEAD Public Schools believes it is in the best interest of schools that the network support schools in the operational and financial requirements of running a school and allow school leaders to focus on academic and cultural concerns. LEAD assesses a management fee of 15% of revenue for each campus to help pay for LEAD central office support. As a result, LEAD has a robust support team to support operational needs.

Ongoing support includes the network senior leadership team as described above and, in addition, shared services and school-based support, such as:

- **Talent and HR:** The chief of HR works collaboratively with the academic team and school leaders to develop hiring rubrics and human capital competencies to use across our network. The talent team is responsible for ensuring a strong pipeline of potential hires across the country through its marketing and engagement efforts and providing preliminary assessment of all external hires. School staff interview all candidates and make the decision to hire a candidate. The HR team then supports the new hire through the offer, salary negotiation, and onboarding process. The HR team provides all support related to payroll, benefits, retirement, paid time off, and worker's compensation for all employees. This team also provides leadership training during LEAD University on HR policies and procedures.

- **Operations:** The operations team is responsible for ensuring smooth day-to-day network operations in the goal of allowing school leadership to focus primarily on academics and culture. Operations is responsible for the oversight of technology, data management, food service, transportation, and facilities management, among other areas. The operations team negotiates vendor contracts, sets service level expectations, builds network infrastructure and develops the policies and procedures to support smooth daily school operations.
- **Academics:** The academic team, consisting of dedicated individuals in the area of curriculum, data and assessment, instructional coaching, school culture, and special populations, provides instructional, culture and leadership coaching to school-level staff throughout the year as well as academic resources such as instructional frameworks, instructional resources, and assessments. This team is deeply committed to driving instruction, teacher development, coaching, and data across the entire network.
- **Finance:** The CFO team consists of our accounting, budget, and finance team. It also includes payroll in collaboration with the talent/HR team. This team manages capital expenditures, financial forecasting, external financial reporting, audit, internal procedures such as purchasing, revenue collection, and federal grant reimbursement, among other things.

The LEAD Network is evaluated in the following ways:

Performance Management Framework: LEAD is held accountable to the performance frameworks of all LEAs that the network operates in. These frameworks provides scores in the following categories:

- Financial metrics, including evaluations of cash flow, balance sheet, and income statement.
- Support to special populations such as ELL and special education
- Grant monitoring
- Crisis management and student safety
- Student data and discipline
- Human capital and licensure
- Timeliness metrics, consisting of the timeliness of the areas above in compliance.

Survey Data: The network is provided anonymous annual feedback from the entire network staff in the form of staff surveys. LEAD uses both the TNTP Insight Survey (which is nationally normed) and an internal survey. The results of these surveys are shared with School Leaders and their team. Feedback is collected in the areas of professional development, instructional support, operational support, human resources, and safety.

Annual Financial Audit: LEAD Public Schools is subject to a third party annual audit of its finances on an annual basis. This information is further reviewed by our charter authorizers and factors into district performance evaluations.

Annual Performance Evaluation of Network Staff: Each member of the Network is provided an annual evaluation by his/her supervisor.

- d. Using Table 5: Decision Making Responsibilities, identify school- and network-level decision- making responsibilities as they relate to key functions.

Table 5: Decision Making Responsibilities

Table 5 is required for all applicants, except for Category 1 applicants

Function	Network Decision-Making	School Decision-Making
Performance Goals	Head of Schools & CAO propose performance goals with input from school leadership teams; CEO ratifies.	School leadership teams (SLT) provide input on performance goals and execute on the established goals.
Curriculum	CAO determines core curriculum with input from school staff.	SLT implements and is able to innovate within the LEAD model as long as major design elements are met.
Professional Development	Instructional PD overseen by CAO. Leadership development is overseen by the director of organizational learning.	Site-based PD is provided by SLT.
Data Management	COO data team is responsible for network data infrastructure.	SLT implements and provides local data-driven instructional support.
Interim Assessments	CAO selects assessment tools with the head of schools and the school director input.	SLT implements IAs and uses results to inform instruction.
Promotion Criteria	CHRO and head of schools are	School director decision with CAO

	responsible for consistent implementation across schools.	approval
Culture	Director of school culture (reporting to CAO) sets network expectations for school culture (including student discipline, student surveys, social and emotional learning, CREW)	School directors are responsible for maintaining the LEAD culture, establishing a Joy Calendar, and responding to diverse needs of individual schools.
Budgeting, Finance & Accounting	CFO ratifies school budget requests with oversight of LEAD Board of Directors and Finance Committee. CFO oversees all accounting and finance functions. CEO is responsible for achieving board approved network budget.	SLT make annual budget requests and are held accountable to meet enrollment, staffing, and expense targets.
Student Recruitment	Director of enrollment and family engagement team create and execute student recruitment objectives.	Schools are responsible for continually engaging their families and creating a culture that students want to stay.
School Staff Recruitment and Hiring	Network HR and talent team recruits a strong pool of candidates.	SLT make hiring decisions for all site-based staff.
H/R Services (payroll, benefits, etc)	Chief HR officer and CFO oversee payroll and benefits for all staff.	Individual managers are responsible for implementing HR policies among their direct reports.
Development/ Fundraising	CEO and VP of development are	Not applicable

	responsible for fundraising.	
Community Relations	Director of enrollment and family engagement team are responsible for community relations.	SLT participate in community engagement events.
I/T	COO and director of data and technology own I/T infrastructure and oversight of IT services.	Director of school operations manage daily maintenance of technology hardware.
Facilities Management	COO is responsible for overseeing facilities vendors and budget.	Director of school operations manages daily facilities needs.
Vendor Management/ Procurement	CFO approves vendors and owns procurement policies.	Director of school operations implements procurement rules at school level and manages daily effectiveness of critical vendors.
Other operational services, if applicable	Not applicable	

Section 2.13 – Network Governance

In this section:

- a. As applicable, describe the governance structure at the network level and how that relates to each individual school. Will each school/campus have an independent governing board, or will there be a single network-level board governing multiple schools? The remaining questions in this section apply only to a network-level board.

All schools within LEAD Southeast Elementary will be represented by the LEAD Public Schools Board of Directors which governs all schools in the LEAD network. Each school also will have its own Family Leadership Team which provides advisory support and feedback to the school leadership team. See Section 2.1 for further details.

- b. Discuss the plan for satisfying the statutory requirement of either having a parent from one of the network's Tennessee schools serve on the governing body or having advisory councils at each school.

The LEAD Public Schools board currently complies with the requirements of having a parent from one of the network's Tennessee schools on the governing board and will continue to comply with this requirement. See Section 2.1 for further details.

- c. Describe the size and composition (current and desired) of the board. Explain how the proposed governance structure and composition will help ensure that there will be active and effective representation of key stakeholders.

See Section 2.1.

- d. Discuss the powers and duties of the board. Identify key skills, areas of expertise, and constituencies that will be represented on the board.

See Section 2.1.

- e. Explain how this governance structure and composition will help ensure that a) the proposed school will be an educational and operational success; and b) the board will evaluate the success of the proposed school and leader.

See Section 2.1.

- f. Explain how the interests of individual schools will be balanced with network interests and how key stakeholders will be represented.

See Section 2.1

- g. Will the charter be held by the same existing non-profit board, or will a new board be formed?
 - a. If the existing board will also govern the proposed school:
 - i. Include a copy of the by-laws and organizational chart, with emphasis on what changes, if any, will need to take place at the board level for it to be effective (i.e., add members, redistribute roles, responsibilities, etc.).
 - ii. Discuss any plans to transform the board's membership, mission, and by-laws to support the charter school expansion/replication plan. Describe the plan and timeline for completing the transition and orienting the board to its new duties.

The new school will be held under the existing non-profit board currently governing LEAD Public Schools, which currently oversees six schools. The composition, membership, mission, and by-laws of the board will not be transformed or altered with the addition of LEAD Southeast Elementary.

- h. If a new board is formed, describe how and when the board will be created and what the relationship between the two boards will be (including any overlapping responsibilities). Please include biographies of the new board members, roles and responsibilities needed to govern the proposed school, organizational chart, and governing board structure. If available, include the by-laws of the new governing board. Please indicate if the charter will ultimately be held by the existing non-profit or a different non-profit board. If the latter, explain the transition.

Not applicable.

Section 2.14 – Network Wide Personnel & Human Capital Projections

Complete the following tables listed below, indicating projected staffing needs for the entire network over the next five years. Include full-time staff and contract support staff that serve the network 50% or more of their time. Change or add functions and titles as needed to reflect organizational plans. If the proposed school plans to use a staffing model that diverges from the school staffing model in the original application, please explain. Add rows as necessary.

- Table 6: School Projections
- Table 7: Management Organization Staff Projections
- Table 8: Elementary School Staff Projections
- Table 9: Middle School Staff Projections
- Table 10: High School Staff Projections

Table 6: School Projections

Table 6 is required for all applicants, except for Category 1 applicants

Totals	Year of Operation					
	Prior to Opening	1 st	2 nd	3 rd	4 th	5 th
	24-25	25-26	26-27	27-28	28-29	29-30
Number of elementary schools	0	2	2	2	2	2
Number of middle schools	3*	3	3	3	3	3
Number of high schools	2*	2	2	2	2	2
Total number of schools**	5	7	7	7	7	7
Total projected student enrollment	2530	2790	2910	3030	3150	3270

*LEAD Southeast is a 5-12 charter and is listed as a high school in this table.

**LEAD Public Schools is currently authorized under the Achievement School District to open additional charter conversion schools, but exact number of schools and grade levels are currently unknown and are therefore not represented on this table.

Table 7: Network Staff Projections

Table 7 is required for all applicants, except for Category 1 applicants

Position	Year of Operation					
	Prior to Opening	1 st	2 nd	3 rd	4 th	5 th
Principal	7.5	8	8	8	8	8
Assistant Principal	17	19	19	21	21	21
Dean	2	2	2	2	2	2
Director of School Operations	5.5	6	6	6	6	6
Instructional Manager	34	34	36	38	40	42
Teacher (Core Teacher)	113	127	115	139	145	147
Teacher (Related Arts)	21	25	25	27	29	29
Reading Interventionist	17	17	17	17	17	17
Math Interventionist	14	14	14	14	14	14
Media Specialist	2	2	4	4	4	4
Resident Teacher	4	4	6	6	6	6
Substitute	14	14	14	14	14	14
Exceptional Education Compliance	1	1	1	3	3	5
Special Education Teacher (Sped, EL, 504)	40	40	40	42	42	42
Paraprofessional	20	22	24	26	28	28
College Counselor	2	2	2	4	4	6
Counselor	14	16	16	16	16	16
Student Support Coordinator	19	19	19	21	21	21
Family and Community Engagement Coordinator	7.5	8	8	8	8	8
Office Manager	6	8	8	8	8	8
Receptionist	6	6	6	8	8	8
Operations Associate	6	6	6	6	6	6
Network: CEO	1	1	1	1	1	1
Network: Finance	8	8	8	8	8	8
Network: Academic	17	17	17	17	17	17
Network: Human Resources	8	8	8	8	8	8
Network: Compliance	2	2	2	2	2	2
Network: Data	6	6	6	6	6	6

Network: Operations	9	9	9	9	9	9
Network: Development	2	2	2	2	2	2
Network: Communications	2	2	2	2	2	2
Network: Head of Schools	3	3	3	3	3	3
Total projected FTEs at CMO	430.5	458	454	496	508	516

Table 8: Elementary School Staff Projections

Table 8 is required for all applicants, except for Category 1 applicants

Position	Year of Operation					
	Prior to Opening	1 st	2 nd	3 rd	4 th	5 th
Principal	1.5	2	2	2	2	2
Assistant Principal		2	2	4	4	4
Director of School Operations	1.5	2	2	2	2	2
Instructional Manager			2	4	6	8
Teacher (Core Teacher)		14	2	26	32	34
Teacher (Related Arts)		4	4	6	8	8
Interventionist			2	2	2	2
Media Specialist			2	2	2	2
Substitute				2	2	4
Exceptional Education Compliance				2	2	2
Special Education Teacher (Sped, EL, 504)		2	4	6	8	8
Paraprofessional				2	2	4
Counselor		2	2	2	2	2
Student Support Coordinator				2	2	2
Family & Community Engagement Coordinator	1.5	2	2	2	2	2
Office Manager		2	2	2	2	2
Receptionist				2	2	2
Total projected FTEs at elementary schools	4.5	32	28	70	82	90

Table 9: Middle School Staff Projections

Table 9 is required for all applicants, except for Category 1 applicants

Position	Year of Operation					
	Prior to Opening	1 st	2 nd	3 rd	4 th	5 th
Principal	4	4	4	4	4	4
Assistant Principal	12	12	12	12	12	12
Dean	1	1	1	1	1	1
Director of School Operations	3	3	3	3	3	3
Instructional Manager	22	22	22	22	22	22
Teacher (Core Teacher)	72	72	72	72	72	72
Teacher (Related Arts)	15	15	15	15	15	15
Reading Interventionist	15	15	15	15	15	15
Math Interventionist	11	11	11	11	11	11
Media Specialist	1.5	1.5	1.5	1.5	1.5	1.5
Resident Teacher	3	3	3	3	3	3
Substitute	9	9	9	9	9	9
Special Education Teacher (Sped, EL, 504)	27	27	27	27	27	27
Paraprofessional	14	14	14	14	14	14
College Counselor	0	0	0	0	0	0
Total projected FTEs at middle schools	249.5	249.5	249.5	249.5	249.5	249.5

Table 10: High School Staff Projections

Table 10 is required for all applicants, except for Category 1 applicants

Position	Year of Operation					
	Prior to Opening	1 st	2 nd	3 rd	4 th	5 th
Principal	2	2	2	2	2	2
Assistant Principal	5	5	5	5	5	5
Dean	1	1	1	1	1	1
Director of School Operations	1	1	1	1	1	1
Instructional Manager	12	12	12	12	12	12
Teacher (Core Teacher)	41	41	41	41	41	41
Teacher (Related Arts)	6	6	6	6	6	6
Reading Interventionist	2	2	2	2	2	2
Math Interventionist	3	3	3	3	3	3
Media Specialist	0.5	0.5	0.5	0.5	0.5	0.5
Resident Teacher	1	1	1	1	1	1
Substitute	5	5	5	5	5	5
Exceptional Education Compliance	1	1	1	1	1	1
Special Education Teacher (Sped, EL, 504)	13	13	13	13	13	13
Paraprofessional	6	6	6	6	6	6
Total projected FTEs at high schools	118.5	118.5	118.5	118.5	118.5	118.5

Section 2.15 – School Replication

Section 2.15 is REQUIRED for all Category 4 applicants

As a Tennessee sponsor requesting replication, all applicants must meet the following additional requirements:

- a. Provide a written statement affirming eligibility requirements to qualify as a Category 4 applicant:
 - i. As a Tennessee sponsor requesting replication, applicants must:
 - Be in compliance with all local, state, and federal laws
 - Be in good standing with existing charter agreement.
 - Be in at least year two (2) of operating its existing school.
 - Currently operates at least one school in Tennessee.
 - Have no material change in focus or grade structure from the existing school seeking replication.
 - b. As Attachment Z, include the original application previously approved and authorized for school being replicated. The application must include all sections and answer all questions currently in the new creation template.

Not applicable.

Section 3 -Financial Plan and Capacity

Section 3.1 - Planning and Budget Worksheet

Public charter schools are required to operate under an annual budget on a July 1 – June 30 fiscal year. For purposes of this application, the proposed public charter school must submit the Public Charter School Planning and Budget Worksheet, which is provided on the department’s website, as Attachment AA.

The budget must include:

- a. All anticipated revenues and expenditures
- b. A back-office budget
- c. Financial implications of facilities plan
- d. Explicitly detail major assumptions including but not limited to:
 - Student enrollment;
 - All anticipated funding sources¹, including:
 - o Local, state, and federal per-pupil funding; eligibility levels; and annual increases
 - o Other government resources
 - o Private fundraising
 - o eRate
 - o Student fees
 - Compensation, including:
 - o Salary table and number of staff by position
 - o Yearly pay increases
 - o Pension contribution and other benefits
 - Line items for each major expense and delineation of assumptions, including:
 - o Instructional materials and supplies
 - o School equipment and furniture
 - o Technology for student and teacher use
 - o Professional development
 - o Student assessments
 - o Student information system
 - o Special education services
 - o Student activities
 - o Authorizer fee
 - o Contracted services at school (audit, I/T, etc.)
 - o Rent, utilities and other facility expenses
 - o Office supplies and equipment
 - o Technology for administrative use
 - o Fundraising materials and resources (non-staff)
 - o Marketing costs
 - o Management fees and any other management compensation (CMO/Network)
 - o Capital, contingency, and insurance reserve funds

¹ Both the budget forms and narrative should specify the amount and sources of funds, property, or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Note which are secured and which are anticipated, and include evidence of firm commitments, where applicable.

See attached updated Budget Document

Section 3.2 - Budget Narrative

As Attachment BB, present a budget narrative including detailed descriptions of budget assumptions, and revenue and expenditure projections, reflecting proposed growth over time. In this section include:

- a. How the proposed budget is adequate to ensure the proposed school model can be implemented fully and how it supports your theory of action concerning student achievement;
- b. An explanation of student enrollment and TISA projections;
- c. An explanation of all anticipated funding sources, including grants, state, federal, and local per-pupil eligibility, other government resources, private fundraising, eRate, student fees, donations, etc.;
- d. If the budget includes fundraising or philanthropic revenue, provide detailed assumptions for how the revenue amounts were determined, and whether the funds have been awarded or are estimates.
 - a. If the proposed school is still in the application process, the narrative should disclose where they are at in the process, the timing of when these funds will be awarded, and a contingency plan should the funds not be realized. Include evidence of awards or firm commitments. Evidence includes a letter, etc.
- e. Specify the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Please note which are secured and which are anticipated and include evidence of firm commitments where applicable.
- f. Provide an explanation of all anticipated expenditures including those identified in Subpart III.I.d
- g. Describe the systems, processes, and policies by which the proposed school will manage accounting, purchasing, payroll, and audits. Include any draft policies on financial controls;
- h. Describe how the proposed school will provide an independent annual audit of school-level operations and comply with other federal or state accounting and/or reporting requirements;
- i. Provide the different roles and responsibilities of the proposed school's administration and governing board for school finances;
- j. If there is a plan to outsource any financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., include a statement on how you will choose and oversee the contractors;
- k. the level of financial expertise of the proposed school's internal and external team members;
- l. the proposed school's contingency plans to meet financial needs if anticipated revenues are not received or are lower than expected;
- m. the cash flow contingency, in the event that revenue projections are not met in advance of opening including
- n. plan explanation and evidence of sources and financing terms if the contingency plan includes loans, commitments from an outside donor, or alternative funding source; and
- o. how one or more high-needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated.

Section 3.3 – Network Financial Plan

- a. Describe the fiscal health of other schools in your network. Are any of the schools on fiscal probation or in bankruptcy?

LEAD Public Schools continues to be in a strong financial position as described in detail in our annual audits, all of which are found on our website, www.leadpublicschools.org, under the “Public Information” tab. LEAD has received an unqualified opinion (clean opinion) from outside auditors each year of its existence, and has had multiple years of budget surpluses, all of which have resulted in a strong cash position. LEAD has met financial compliance expectations, including submitting annual budgets and audited financial statements to authorizers and the state in a timely fashion. LEAD does not have any schools on fiscal probation or in bankruptcy.

- b. Explain how the organization will reach its fundraising goals over the next five years. Provide a development plan that includes staffing needs.

LEAD is dedicated to actively raising philanthropic funds for the benefit of its students. At this time, we do not have plans to increase either our philanthropic estimates or our current staffing. All budgeted projections are based on actuals over the past five years. Our network budget evidences total network philanthropic dollars of \$1.9M per per year.

Fundraising is secured through annual fundraisers, most notably, our Commitment Breakfast, through solicitation of individual donors and through private grants. Private grants have included, as an example, Charter School Growth Fund, Dollar General, SCORE and the TN Arts Commission. Development staff is budgeted at a network level and currently includes a VP of Development and a Director of Development.

Additional fundraising opportunities for new schools include CSP funding and private grants specifically for the creation of new seats. LEAD Public Schools has a track record of applying for, securing and successfully managing, CSP grants, for a total of \$2.4M. In addition, LEAD has engaged other donors around future growth plans should future charters be secured.

- c. Provide, as Attachment CC, a detailed budget for the network. You may reference the school-level budgets provided on the application, as appropriate. Applicants must submit financial forms detailing:
- A back-office budget;
 - Financial implications of facilities plan;
 - All major assumptions including but not limited to:
 - Student enrollment;
 - All anticipated funding sources² (at the network level), including:
 - Local, state, and federal per-pupil funding; eligibility levels; and annual increases;
 - Other government resources;
 - Private fundraising;
 - eRate;

- o Student fees;
- Total employee compensation (network/CMO level), including the percentage of the total compensation allocated for the proposed school;
- Management fees and any other management compensation to the CMO or network (if applicable); and
- Capital, contingency, and insurance reserve funds.

Please see the attached revised version of the Network budget without Brick Church, updated with current assumptions.

Section 4 - Portfolio Review & Performance Record

4.1 - Portfolio Summary

For purposes of this application, the sponsor must submit the Portfolio Summary Worksheet, which is provided on the department's website, as Attachment DD. The portfolio summary shall encapsulate all schools that are currently or were previously operated and/or managed by the sponsor, governing body, network, and/or charter management organization.

The summary must include:

- a. List all charter schools that are currently and/or were previously operated and/or managed by the sponsor, governing body, network, and/or charter management organization seeking authorization for each status below:
 - Actively operating
 - Pre-Opening
 - Pending Authorization
 - Withdrawal or Non-Openings
 - Voluntary Closures
 - Involuntary Closures
- b. For each school, include the following information:
 - General Information
 - Name of School
 - School Status
 - Operating Years as applicable: Year Opened and Year Closed
 - Address including City, State / Territory
 - Grades Served
 - Total Enrollment
 - Statewide Designations
 - All state-wide designations earned within the last five years (*ex: reward and priority*)
 - Graduation & Promotion Rate for Prior Year
 - Demographics and Socioeconomic Breakout
 - % African American, Asian, Hispanic, White, Other Race / Ethnicity
 - % FRPL
 - % SPED
 - % ELL
 - School Contact Information
 - Contact Name, Title, Email, Phone Number
 - Authorizer Contact Information
 - Authorizing Organization
 - Contact Name, Title, Email, Phone Number

4.2 - Performance Record: Academics

Student Achievement and Growth

In this section:

- a. Provide detailed student achievement and growth results for each school that was operated, including results for

grade levels not tested on state assessments. This should include both internal assessments and state assessments. As Attachment EE, include internal assessments.

- As Attachment FF, include state assessments.

b. Provide evidence that demonstrates the success of schools operated in raising student achievement levels.

LEAD has a proven track record of delivering on its mission to prepare students for college and life and has been a key partner in closing the achievement gap in Davidson County for the past 15 years.

Examples of historical success include, but are not limited to, the following:

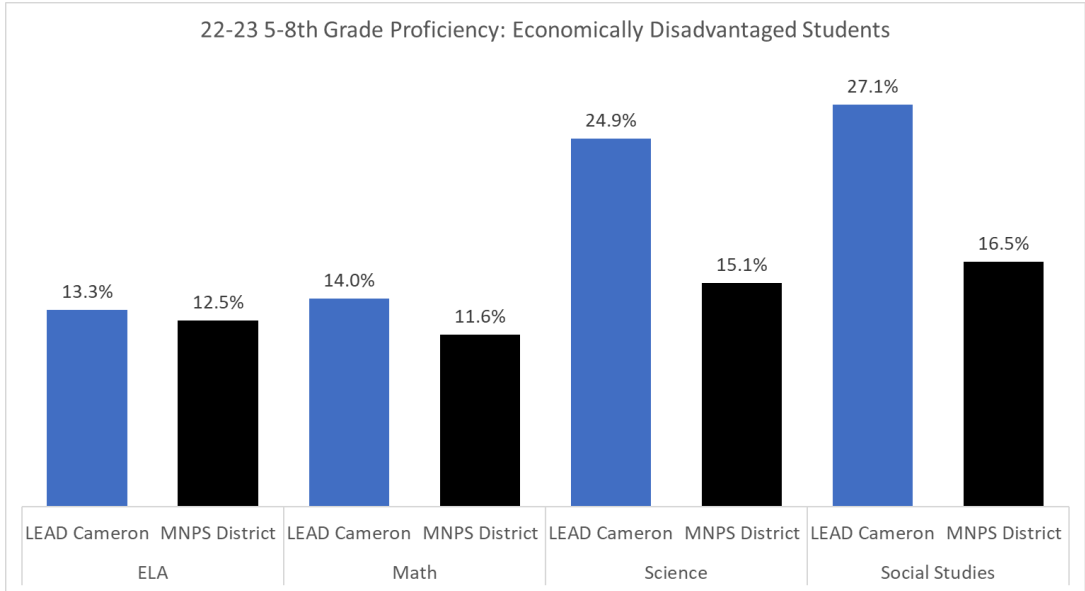
- LEAD Public Schools was identified as a “gap buster” in both reading and math for closing achievement gaps by Stanford Credo’s National Charter School Study 2023¹⁷, in addition to evidencing strong positive growth results in both reading and math.
- Since assuming the charter in 2011, LEAD Cameron has been a TVAAS Level 5 school for overall growth every year with the exception of 2020-21 (a hold harmless year heavily influenced by the pandemic). In addition, Cameron has been named a Reward School for top academic growth three times: 2013-14, 2016-17, and 2017-18.
- With the exception of 2020-21, LEAD Southeast Middle and High School has been a Level 5 school for overall growth every year since assuming the charter in 2012 and was named a Reward School for top academic growth in 2014-15 and 2016-17.
- In 2022, LEAD Neely’s Bend was the first ASD school located in Nashville to exit the priority list.
- Graduation rates for LEAD Academy (90%) and LEAD Southeast (93%) reported for 2022 are higher than the district average of 82% and the state average of 88.7%.
- LEAD has been recognized for its innovative Employee Value Proposition, approach to teacher and leader development, and related compensation model and was awarded multiple rounds of the Teacher and School Leader (TSL) Grant by the U.S. Department of Education.
- LEAD became the first turnaround operator in the state of Tennessee by engaging with MNPS in the first charter conversion process of LEAD Cameron in 2011.
- LEAD has successfully moved two schools, LEAD Cameron and LEAD Neely’s Bend, out of the bottom 5% performing schools in achievement in Tennessee.
- LEAD has achieved priority exit status for both LEAD Neely’s Bend and LEAD Brick Church.

Emerging from the pandemic, LEAD has seen significant growth across its network of schools. Of TVAAS scores earned in each subject area in the past two school years, 86% of scores have been at a Level 3, 4, or 5 with 61% at Level 5. Of particular note was the elevation in TVAAS scores at LEAD Academy from 2021-22 to 2022-23. At this school, we were concerned by the Level 1 performance in 2021-22 and underwent a “Drive to 5” campaign across the school to raise TVAAS scores. The Drive to Level 5 Campaign focused on the prioritization of high-quality standards-based instruction, extended learning opportunities and enrichment, the use of data to identify students’ current performance levels and learning needs, the reduction of chronic absenteeism, and incentivising student and staff

¹⁷[As a Matter of Fact: The National Charter School Study III 2023](#), Stanford University

engagement, which promoted a culture of learning and celebration. While we did not quite reach our goal by scoring a Level 4 composite in 2022-23, we did succeed in raising TVAAS scores in every domain and, as a result, saw an almost five percentage point increase in school success rate. This is an example of the targeted approach our network takes to quickly address lagging indicators.

LEAD schools are proving what’s possible for low-income students. Specifically, economically disadvantaged students at LEAD Cameron middle school outperform the proficiency of those students at the district in every subject area.



Also notable is LEAD's performance as compared to zoned middle schools within the communities and/or MNPS clusters in which they operate. In the 2023-2024 school year, LEAD Cameron's state success rate, at 16%, was almost twice that of Wright Middle School, the other zoned middle school within the Glenclyff Cluster. LEAD Southeast Middle's state success rate was 25.8%, over three times that of Wright Middle School. Additionally, both LEAD Cameron Middle and LEAD Southeast Middle earned the highest number of points possible in the growth component of the state's accountability framework, with Level 5 TVAAS scores for both composite and for the bottom 25%, while Wright Middle School demonstrated a composite TVAAS score of 1 with a 4 for those in the bottom 25%. Though Wright Middle School, LEAD Cameron and LEAD Southeast all earned level 5 composite TVAAS in 2022, LEAD Cameron Middle and LEAD Southeast Middle demonstrated federal success rates of 11.9% and 18.7% respectively, while Wright demonstrated a success rate of 6.2%.

LEAD Southeast Middle draws students not only from the Glenclyff Cluster, but also from the Antioch and Cane Ridge Clusters, particularly the areas zoned to Antioch Middle School and Apollo Middle School. For the 2023 school year, LEAD Southeast Middle outperformed both of these district middle schools in achievement and growth. Both Antioch Middle School and Apollo Middle School demonstrated Level 1 composite TVAAS, with Antioch Middle School earning a Level 5 for students in the bottom 25% and Apollo earning Level 3 for the same category. Antioch Middle school demonstrated a state success rate of 11.5%, while Apollo Middle School demonstrated a success rate

of 10.1%.

The trend of outperforming neighboring traditional schools continues with both LEAD Brick Church in the White's Creek Cluster and LEAD Neely's Bend in the Hunter's Lane Cluster. For the 2023 school year, though LEAD Brick Church's state success rate was below the White's Creek Cluster magnet school Isaiah T. Creswell School of the Arts, it was above neighboring Haynes Middle School, with Haynes demonstrating achievement of 5.6% and LEAD Brick Church of 10.3%. LEAD Brick Church also enrolls a significant number of students zoned to Jere Baxter Middle School in the Maplewood Cluster. Jere Baxter's state success rate was below 5% and their TVAAS scores were Level 1 in both the composite and bottom 25% categories. Though their TVAAS was a level 5 in 2022, Jere Baxter's federal success rate was below 5%, while LEAD Brick Church achieved 5.7%.

LEAD Neely's Bend underperformed Goodlettsville Middle School's state success rate of 18.7% with a success rate 12.9%; however, Neely's Bend outperformed Goodlettsville in TVAAS growth in both the composite category and the bottom 25%, earning Level 5 in both areas. LEAD Neely's Bend outperformed Madison Middle School on its state success rate, with Neely's Bend scoring 12.9% and Madison scoring 11.4%, and on composite TVAAS growth with Neely's Bend scoring a Level 5 and Madison scoring a Level 4. Similar trends held true in 2022, with all three middle schools in the Hunter's Lane Cluster scoring Level 5 composite TVAAS, while Goodlettsville Middle earned a federal success rate of 12.6%, Neely's Bend earned 10.3% and Madison Middle earned 6.4%.

Finally, LEAD's two high schools also have a track record of outperforming the traditional MNPS comprehensive high school within their cluster. In 2023, LEAD Academy and LEAD Southeast Middle demonstrated success rates of 17.4% and 25.6% respectively, while Glenclyff High School demonstrated a state success rate of 6%. In 2022, LEAD Academy's success rate was 9.8% and LEAD Southeast Middle's was 18.7%, while Glenclyff High School's was below 5% and, thus, unreportable. In both 2022 and 2023, Glenclyff High School was identified as a school in need of Comprehensive Support and Improvement.

For a detailed look at school performance across the Network, please see attachment EE for MAP and interim assessments and FF for TCAP assessments.

In this section:

- a. For all schools operated, describe the educational program at your existing or previous school(s) and its successes and challenges.

Educational Programming: Mission

LEAD Public Schools' mission is to prepare all students for college and life. Two of our middle schools, LEAD Brick Church and LEAD Cameron, serve zoned populations in grades 5 through 8 in the MNPS clusters in which they are located, while LEAD Neely's Bend, LEAD Southeast, and LEAD Academy operate as fully open

enrollment schools. Each of our schools place an emphasis on college preparatory and personalized learning for all students in our care. As a whole, LEAD's educational program can be summarized by the vision for effective teaching honed and practiced by all staff. At LEAD, effective teaching means facilitating data-driven, student-centered work that is balanced by both rigor and love and supported by a strong classroom culture and high expectations.

LEAD's founding mission was to support, train, and educate the next generation of responsible citizens. From the beginning, we have emphasized academic growth and student support services as a means of developing well-rounded scholars. Over the past 15 years, the mission has evolved to a more comprehensive focus on *preparing all of our students with the knowledge and skills to succeed in college and in life*. While not radically different than the founding mission, the current mission statement reflects our emphasis on all-means-all; every student who comes to a LEAD school, no matter what their needs or educational level, will leave the school prepared for the rigors of life and equipped with the social/emotional skills to succeed in and out of school.

LEAD's core values are embodied in the school's Ethos, comprising five components: courage, commitment, discipline, self-reliance, and service to others. All of our schools' programming—both academic and cultural—is built on the LEAD Ethos. Students and adults are expected to exemplify these values in everything they do.

Educational Programming: School Culture

An effective educational environment is not limited to academics; LEAD middle and high schools emphasize the social and emotional development of every student as well. The foundation for this growth begins with the strong relationships that our teachers build with our students to create the space for social-emotional growth. School culture feedback has shown that LEAD schools across the network are places where students are developing strong relationships with adults, with 79 percent of LEAD students agreeing that, "I have an adult in the school I know I can trust" and 89% agreeing that, "My teachers believe in me".

In addition to the relationships that our teachers build with their students in our core content classes, we have a specific focus on social-emotional development through our Crew structure. Every student at LEAD, at both the middle school and high school level, is part of a Crew, a small group of 15-20 students paired with one teacher for lessons on character traits, recent events, executive functioning skills, and real life reflection. Crew is also a place where teachers do academic and wellbeing checks on their students to ensure that students' needs are addressed as a whole child. Crew sessions are scheduled weekly at the middle school level and daily at the high school level.

We have focused on creating a learning space that is respectful of student backgrounds, culturally responsive, and supportive of all student needs. We have developed a cultural model implemented in each school that includes trained counselors on staff and a robust culture team, led by an assistant principal of students who works with support staff to bring joy and discipline to the school. Additionally, each school has a family and community engagement coordinator who works with families and neighborhood partners to make sure that

we are seeking and acting upon input from all of our stakeholders. The family and community engagement coordinators at LEAD support active Family Leadership Councils who contribute to school improvement plan creation, Title I spending, various school-level events, and consistently meet with the principal to discuss how parents and the community can play a major role in supporting their specific school.

Another critical component of our values is standing by our families and local community. LEAD Academy, LEAD Brick Church, LEAD Cameron Middle, LEAD Neely's Bend and LEAD Southeast Middle and High School share robust partnerships with multiple external community organizations including, but not limited to the following:

- Meharry Medical Center
- University School of Nashville
- Casa Azafran
- NAZA
- Harvest Hands
- The Nations Ministry
- Nashville International Center for Empowerment
- Small World Yoga
- Caron Treatment Centers
- Animax Designs, Inc.
- Second Harvest Food Bank
- Well Child
- Bridge Ministry
- Madison Community Center
- Local Police Departments

Our internal partnerships with students and families are highly valued. LEAD uses Possip to regularly survey parents/guardians to gauge their satisfaction throughout the Network and DeansList to keep families up to date about day-to-day school events. Student-led conferences (SLCs) are one of our key engagement initiatives conducted annually. During these sessions, students communicate their successes and challenges and are able to review their academic progress with family members and community volunteers.

Educational Programming: Academic Programming for Middle and High Schools

Our educational model is built on the belief that all students can excel when given the right opportunities and support. Since we believe and research demonstrates that mastering academic standards sets students up for success in life, all students within LEAD's middle schools spend extra instructional and small group time each day focused on literacy and numeracy development as we work to close academic gaps and ensure all of our learners are ready for college and life. Students identified as needing literacy and numeracy intervention at the high school level enroll in targeted intervention classes, while those needing extra support to meet academic milestones receive personalized tutoring during the school day and through after school opportunities. Students learn rigorous, standards-aligned content based in research-proven curricula designed to enhance problem-solving and critical thinking skills necessary for college- and career-readiness.

Literacy, along with the recognition that ELA drives success in all subject areas, remains a core tenet of our approach to instruction, as does high-quality state standards-aligned curriculum, data-driven instruction and our overall assessment philosophy. In 2021-2022, the LEAD network introduced new math and ELA curricula across all grades, ensuring teachers were supported and trained on these new core curricula. We have continued to provide robust support in math and ELA, while also supporting the adoption and implementation of common curricula across the network in science and social studies. The network has also added positions to support science and social studies content teachers. We are expanding data-driven instruction services that function within our curriculum to align assessment strategies culminating in predictive interim assessments.

From the beginning, LEAD put forth significant resources and efforts into supporting diverse learners, including students with IEPs and English Language Learners. As a network, LEAD's EL population makes up approximately 40% of our students, while approximately 12% of our students have disabilities. In comparison, MNPS reported 12% students with disabilities (students with disabilities) and 27% English Learners with Transitional 1-4 in 2023.

Even when student achievement overall increased, we realized that we were struggling across all of our schools to consistently narrow achievement gaps among all students and our students with disabilities and English learners. In 2021, LEAD entered a partnership with All Means All (AMA), a 15-month, cohort-based fellowship for school leaders and their school- or network-based teams. The program pairs key levers to address inequity in schools with deep coaching, feedback, and collaboration to sustain it. Through this work, we have been able to shine light on systemic barriers to achievement for our diverse learners and to begin the work to address the root causes of lack of strong student outcomes. Essential to this work is our focus on narrowing the differentials in achievement on both our network-wide and state assessments. After each interim assessment, these differentials are analyzed and strategies for addressing areas of need are formulated.

AMA has also informed our work around hiring, staff development, and staff ownership of the opportunities and challenges within our schools. Through AMA, each participating school has revisited their mission and developed a set of values, actions, and behaviors we believe to be essential for staff success in increasing student outcomes. We are unashamedly transparent about these beliefs within the hiring process and have found that this transparency has led to hiring of staff who are aligned with our belief in the inherent worth of all students and their capacity to grow and learn. Staff are grounded in each schools' values, actions, and behaviors upon their entry and intentional reorientation occurs frequently throughout the year. LEAD staff regularly engage in data-driven decision making, and AMA's radical problem solving process has allowed team members from diverse roles and backgrounds to work together to tackle problems from a variety of perspectives. This process creates buy-in for solutions to challenging situations and distributes ownership for the work to accomplish those solutions among school teams. Finally, our work with AMA has fostered a laser-like focus on narrowing gaps in student achievement and reducing

differentials among student subgroups and the “all students” category on network- and state-wide assessments as well as nationally normed assessments.

Central to all our work is ensuring that teachers have the skills and resources necessary to implement our instructional model with fidelity and to target instruction to drive the strongest outcomes for students. We have invested heavily in a coaching model that provides teachers with the support they need to develop best in class management structures, data-driven practices, and clear lesson planning practices that lead to the internalization of curriculum so that our time is spent on student actions and student success. Teachers and instructional coaches are supported across core content areas by the Network Academic Team. The effects of this support can be seen not only in increasing student outcomes, but also within LEAD’s latest employee engagement survey. Ninety-five percent of LEAD’s employees feel that they are making a positive difference in the lives of our students, with 94% reporting they are fully invested in LEAD’s mission, vision and ethos, and 90% reporting they clearly understand what is expected of them at work.

We have added administrative support in the form of assistant principals and instructional managers dedicated to specific subject areas and cultural excellence. This ensures that every teacher has a dedicated school leadership team member to provide coaching and development. The Academic Team has developed and is implementing an assistant principal of instruction (API) cohort focusing on both best practices in the art of instructional coaching, content-specific coaching practices, and data-driven instruction. Academic Team members also meet regularly with instructional managers at their schools and conduct bi-weekly “huddles” to facilitate collaboration among similar roles across the network.

Finally, the focus on data-driven instruction and decision making has been embraced by network and school teams and has been enhanced through the refinement of our assessment strategy and the development of our Student Needs Analysis Protocol (SNAP). Academic and culture data are reviewed in accord with continuous improvement cycles in which data is used to plan, plans are implemented, data are gathered and reviewed, and refinements to plans made based upon that data. Examples of this include the following:

- At the middle school level, exit tickets and student work are analyzed at least 2-3 times per week to determine areas for review as soon as the next day of instruction.
- Quiz, mid-unit assessment, and unit assessment data is used to identify strengths and areas for targeted instruction via spiraled Do Nows, embedding review into upcoming lessons, or full reteach lessons.
- SNAP meetings are conducted every mid-quarter to ensure students in need of academic, behavioral or attendance interventions receive timely support and to assess improvement in identified areas of need.
- Interim assessments, given three times per year, are analyzed within days after administration and data are used to develop reteach plans.

- MAP assessments are administered three times a year in grades 5-11, and progress towards Individual Growth Goals is evaluated and discussed with students resulting in plans to develop critical skills, including strategic placement in reading and math interventions, developed.
- Progress monitoring data informs success and areas of need for students enrolled in Tier 2 and Tier 3 interventions.
- TCAP assessments are reviewed at the end of each school year to inform instructional planning for the upcoming school year.

Successes and Challenges

Over the past 15 years, we have adopted new practices in an effort to respond to challenges as they arise, to tailor our model to the specific needs of the students at each LEAD school and to continuously improve our academic program. Below we have outlined some of the core practices that have evolved over time or have been enhanced:

1. **Updated staffing model.** Over time, additional TISA funding has allowed us to expand our staffing model, most notably by the inclusion and development of multiple instructional managers and other instructional leaders. At LEAD schools across our network, we have built a model wherein there is one instructional leader for every six to eight teachers. This allows our coaches to prioritize the development of our teachers through regular, on-going feedback.
2. **Updated approach to the school year and school calendar.** We found that Saturday school was not an effective tool for accelerating learning, as many of our families were unable to participate and it led to instructor burnout. Instead, we have focused on providing a high-quality summer school for our students. Many of our families have students in multiple MNPS schools and feedback from families and attendance data showed that many families preferred to have all their children in a similar school calendar. We have chosen to closely follow the school calendar set by MNPS and focus on the quality of time in the school day rather than the quantity of time. Similarly, we moved to a consistent school day Monday through Friday rather than an early release on Wednesday, which was difficult for working parents. Rather than providing a half day PD for staff on Wednesdays, we maintain an increased number of staff days in our calendar for staff professional development, especially during the summer, and require one day weekly of after school PD.
3. **Enhanced curriculum.** Over the years, our academic model has been tailored to meet the needs of LEAD students and changing Tennessee academic standards. We have chosen to implement instruction using the following curricula, ensuring careful alignment with Tennessee State Standards:
 - Achievement First (AF) Math - Grades 5-8: The Achievement First (AF) middle school math curriculum has been designed to provide students with standards-aligned, rigorous grade-level work every day. The design of the lessons asks students to grapple with a problem by making connections to previously learned content, and then leverage their own thinking and the thinking of their peers to gain new insights and content

understandings. The lessons aim to meet the definition of rigor in math: a balance of fluency, conceptual understanding, and coherence.

- Reading Reconsidered - Grades 5-8: Reading Reconsidered is a novel centric curriculum focused on knowledge building and writing. Students engage with text in three different ways: Accountable Independent Reading (silent, autonomous reading), FASE Reading (shared read-aloud between students and teachers), and Read Aloud (teachers reading texts out loud).
- Gallopade - Grades 5-8: Gallopade is a curriculum focused on Tennessee Academic Standards for social studies and is designed to engage students in a multi-sensory learning experience. Gallopade blends interactive print and digital tools with literacy enhancement builders.
- STEMScopes - Grades 5-8: The STEMScopes Tennessee curriculum is structured not only to help children learn science concepts, but also to develop an ability to think scientifically. This core curriculum integrates active investigation and multisensory learning, an approach proven effective for all learners regardless of prior knowledge, language, or background. Additionally, STEMScopes follows the 5E model for teaching science which has students start with hands-on learning through inquiry. Teachers and instructional managers work together to ensure that supplements are woven into the curriculum to meet all Tennessee Science Standards.
- Louisiana Guidebooks (Odell Education) - Grades 9-12: Louisiana Guidebooks, developed in collaboration with Odell Education, is focused on ensuring that all students can read, understand, and express their understanding of complex, grade-level texts. Each unit is grounded in a collection of texts surrounding a shared idea and contains authentic texts and novels written by both classic and contemporary authors. Students engage with these texts repeatedly throughout a unit to develop deep knowledge of significant ideas, perspectives, and literature. Students are provided multiple opportunities to engage in research and argumentation.
- Discovery Education Science - Grades 9-12: Discovery Education is a phenomena-based comprehensive, research-based three-dimensional science program that combines digital-first learning with Tennessee state standards aligned content. Three-dimensional instruction focuses on the idea that students should develop proficiency not only in science content knowledge, but also in application of practices used by scientists and engineers and a broader understanding of the concepts that span multiple scientific disciplines. Students engage in active investigation of phenomena through questioning, modeling, data collection and analysis.
- Open Up Math - Integrated Math I, II, & III: Open Up High School Math lessons are structured around the 5 practices for Orchestrating Productive Mathematics Discussions (Smith and Stein, 2018). Students make real world connections through task-based problems and engage in meaningful sense-making and problem solving to form a foundation for understanding mathematical procedures. Open Up offers strong differentiation to meet the needs of all learners, with both enrichment and scaffolding

opportunities embedded throughout. Mathematical language routines aid in developing students into mathematical thinkers and promoting mathematical literacy. Teachers have access to selecting, sequencing, and connecting charts to support teachers in their practice.

- Math Medic - Statistics and Calculus: Math Medic approaches instruction with the philosophy of Experience First, Formalize Later. Students begin each lesson working collaboratively to think, discuss and construct their own understanding of new content before the teacher assists them in arriving at formal definitions and formulas. This approach builds student confidence to build upon their knowledge to flexibly adapt when a scenario changes. These thinking and reasoning skills transfer to other life contexts.
- Prisms VR - High School Math and Science: Prisms VR is a spatial learning platform that allows students to grasp abstract math and science concepts using virtual reality. Prisms is a supplement to our current curricula. Students engage in Prisms lessons that have been carefully chosen by our directors of math and science and deemed aligned with LEAD's math and science curricula and, thus, Tennessee academic standards.
- Common Intervention Curriculum - Common curricula are utilized for both reading and math intervention for students with IEPs, as well as for Tiers II and III of Response to Instruction and Intervention. For reading intervention, exceptional education teachers utilize Brainspring Phonics First & Structures curricula, Orton-Gillingham Multisensory Structured Literacy programs. Both programs are accredited by the International Dyslexia Association (IDA). RTI Reading interventions utilize SRA Corrective Reading Decoding Strands A, B1, B2, C. *SRA Corrective Reading* provides intensive direct instruction-based reading intervention for students in Grades 3–Adult who are reading below grade level. This direct instruction reading intervention program delivers tightly sequenced, carefully planned lessons that give struggling students the structure and practice necessary to become skilled, fluent readers and better learners. The program is research-based and highly scripted.

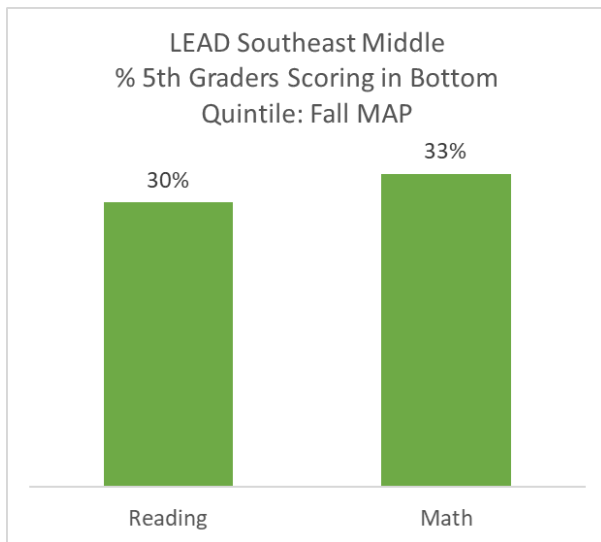
For math intervention, RTI math interventionists utilize the Do the Math curriculum. This heavily scripted, direct instruction curriculum is grounded in manipulatives and focused on building students' numerical reasoning skills through multiple representations. Do The Math builds and rebuilds critical foundations by focusing on understanding and skills with both whole numbers and fractions. Students make progress through carefully scaffolded instruction from the basics to more complex operational work. Students learn, process, and build a deep understanding of crucial arithmetic concepts. Math intervention is provided daily in small doses to groups of 3-8 students. Students are placed in intervention groups focused on addition and subtraction, multiplication, division, or fractions based on need determined through a combination of universal screening and math placement tools.

4. **Enhancements to our Academic Model:** At the network level, additional support has been added to enhance student learning across the continuum.
- MTSS Model: To support our multi-tiered systems of support (MTSS) model, we hired a director of MTSS to lead the work around expanded intervention in reading and mathematics, as well as a director of student supports to lead the work around behavioral supports. At the school level, instructional managers, assistant principals of instruction, assistant principals of students, and deans of culture monitor these efforts to ensure students' academic and emotional needs are met.
 - Diverse Learners: As our student demographics have changed with an increase in both students with disabilities and English learners, additional supports have been added at the school and network levels.

Our English Learners are given opportunities to demonstrate proficiency in their home language and pursue the pathway to the Seal of Biliteracy through Avant assessments, computer adaptive language proficiency assessments. Students' progress towards achieving their ACCESS growth goals is monitored using internally developed formative language assessments. Strong instructional practices are evaluated using internally developed EL Arcs of the Year, a document focused on best practices in EL instruction and teachers' improvement in their use throughout five distinct segments of the year.

A robust universal screening process allows us to more effectively identify students in need of additional support and to quickly begin the progress monitoring process. At the network level, our director of exceptional education instruction works closely with instructional managers to provide professional learning focused on differentiated instruction and behavior support. In collaboration with network core content area directors, training focused on serving diverse learners across all content areas is routinely delivered. Our director of exceptional education compliance focuses on ensuring that school teams are well trained in development of IEPs tailored to meet the needs of students with disabilities while supporting instructional managers meeting compliance requirements at the school level.

- Foundational Reading Training: In accordance with state law, all 5th grade teachers are trained in the principles of foundational reading. Professional learning has been developed in partnership with TNTP and based on the TN Foundational Reading Standards. In the 2021-2022 school year, LPS took this training a step further by requiring it not only for all 5th grade teachers but also all EL, ExEd, and ELA teachers, regardless of grade level served



Curriculum and Response to Assessment Results

In 2021, school and network leaders recognized the need for stronger ELA curricular support. We sought the expertise of The New Teacher Project (TNTP) whose mission is to end the injustice of educational inequality by providing excellent teachers to the students who need them most and by advancing policies and practices that ensure effective teaching in every classroom. With their help, we researched and adopted Reading Reconsidered, a curriculum developed through UnCommon Schools. We continued our partnership with TNTP as we moved into curriculum implementation in 2022, and we also sought the expertise of Reading Reconsidered curriculum developers.

We believe the investment in reading intervention will ultimately positively impact ELA achievement; still, we know that success from Tier 2 and Tier 3 interventions takes time to develop. Strong Tier 1 instruction is crucial to student success. Analysis of middle school ELA scores at LEAD revealed overall minimal proficiency gains from 2022-2023. Additionally, while LEAD Cameron Middle and LEAD Neely's Bend saw TVAAS Level 5 for literacy, LEAD Southeast Middle demonstrated Level 1 TVAAS and LEAD Brick Church demonstrated Level 3.

LEAD ELA Proficiency			
<u>ELA: Percent On Track/Mastered</u>			
Subject	2021	2022	2023
LEAD Academy	16.6%	17.1%	23%
LEAD Brick Church	<5%	5.8%	6.91%
LEAD Cameron Middle	8.8%	11.5%	12%
LEAD Neely's Bend	9.6%	10.4%	11.10%
LEAD Southeast Middle and High School*	15%	21.5%	23%

*LEAD Southeast success rate includes grades 5-12.

These results are aligned with national trends. In a July, 2023 report based on NWEA MAP data¹⁸, The Center for School and Student Progress found that in the 2022-2023 school year, nearly all grades demonstrated achievement gains that fell short of pre-pandemic trends, stalling progress towards pandemic recovery. Significant achievement gaps persisted at the end of the 2022-2023 school year, with the average student needing 4.1 months to catch up in reading and 4.5 months to catch up in math. While all students lagged in achievement, traditionally underserved students remained farthest from full recovery.

Post-pandemic, more than ever, strong Tier 1 instruction is the key to increasing student outcomes; thus, our network literacy director is supporting instructional managers in their development of teachers through strengthening the process of IPP (Intellectual Preparation Protocol) and data analysis. Based on review of 2023 TNReady data, she is also leading additional efforts to increase student outcomes in ELA including curriculum modification, refinement of ELA priorities, and enhancing teacher quality and development. For curriculum modifications, we are adjusting questions in lesson plans to mirror the language used in standards and state assessment and adding more multiple choice practice. We are also using Patterns of Power, a supplementary grammar curriculum, and network mid-unit essays including explicit writing instruction for all three types of essays (narrative, informational, and argumentative). We are in our third year of using the Reading Reconsidered curriculum and spent our summer professional development moving teachers from using the curriculum with fidelity to using the curriculum effectively. This includes incorporating student autonomy, cultivating a culture of error so students feel safe to get the answer wrong and revise their response, and training teachers to plan rigorous exemplars and holding students to reaching those through back pocket questions. Lastly, we are improving our hiring process to ensure teachers are certified in literacy instruction and retaining effective teachers so we can continue to develop them in the curriculum year after year.

At the high school level, we saw similar challenges. We are in our third year of using Louisiana Guidebooks, and while we showed an almost 6% increase in proficiency from 2022 to 2023 at LEAD Academy, we did not see the progress we would like at LEAD Southeast High School. Additionally, we are not seeing at either high school the progress on the ACT that we know our students are capable of. At the network level, we hired a literacy coordinator to focus on high school ELA. She has spent the past two years responding to analysis of EOC assessments, interim assessments, and bi-weekly touchpoints in English I, II and III. She has collaborated with school partners to create and enhance lessons to ensure students receive the writing and grammar skills necessary for success not only on TCAP assessments, but also on national assessments such as the ACT. Still, we are finding that we do not believe this curriculum to be the best fit for our students. A review of alternative high school ELA curriculum is currently underway with intended plans for adoption of the new curriculum in the 24-25 school year.

¹⁸[New NWEA Study Shows Progress Toward Academic Recovery Stalled in 2022-23](#), NWEA

The 2022 school year was one in which many new curricula were introduced to staff and students. A change in high school math curriculum was a direct response to the change in Tennessee academic standards. Prisms VR was added as a supplement to high school math and science curricula as we looked to find additional ways to engage students not only in building the foundational math skills necessary for success on EOCs and the ACT, but also in exploring new ways to use relevant technology in the classroom. Along with the addition of dedicated network directors of science and social studies, common science and social studies curricula were added to support new and veteran teachers as we work to increase achievement across the network.

While we have not made any significant modifications to Achievement First, the math curriculum utilized at the middle school level, the need for increased coaching support led us first to engage in partnership with Achievement First through participation in their summer coaching institute as well as through individual coaching through Achievement First for the network's director of mathematics and school-based instructional managers. Evaluation of the importance of this extra support led us to hire a network mathematics coordinator with strong expertise in our chosen curriculum. She currently focuses on middle school math instruction and plays a strong role in training math interventionists.

LEAD's Academic Team, along with heads of schools, keeps a close eye on student achievement across all core subjects and leads data analysis with school teams. Regular data stepbacks occur surrounding interim assessments, MAP, ACT, AP, EOC and TCAP results. In 2021, analysis of ACT data led to the hiring of a network director of college and career who is leading the charge to increase student achievement on the ACT. She meets regularly with network directors of ELA, math, science and social studies to collaborate on ways to build skills needed for student success on the ACT into core content classes. These stepbacks have also led to other changes such as the expansion of both reading and math intervention mentioned in the previous section, the decision to use MAP to gauge foundational math and reading needs for high school students through grade 11, and the hiring of additional network staff in ExEd and EL to place a stronger emphasis on instruction for diverse learners while ensuring all compliance requirements are met.

School Performance

In this section:

- a. Select one or more of the consistently high-performing schools operated and discuss the school's performance.
 - Be specific about the results on which you base your judgment that the school is high-performing.
 - Discuss the primary causes to which you attribute the school's distinctive performance.
 - Discuss any notable challenges that the school has overcome in achieving its results.
 - Identify any ways in which the school's success has informed or affected how other schools operate. Explain how the effective practice or structure, or strategy was identified and how it was implemented elsewhere.

Since its founding, LEAD Southeast Middle and High School has been successfully preparing students for college and life. LEAD Southeast Middle began with grade 5 in 2013, adding one grade each year. LEAD Southeast High School graduated its first senior class of 56 graduates in May 2021 with a graduation rate of 92.6% as compared

to the State’s rate of 88.7% for the same year¹⁹. LEAD Southeast High School’s graduation rate (as indicated on the MNPS Charter Performance Framework) was 90.2% for the 2022 school year. LEAD Southeast Middle and High School has been a Level 5 school for overall growth every year since assuming the charter in 2012 with the exception of 2021, a hold harmless year, and was named a Reward School for top academic growth in 2014-2015 and 2016-2017. Authorized by Metro Nashville Public Schools, LEAD Southeast Middle and High School retains students in a densely populated and quickly-developing quadrant of the county. We are proud to educate these students in partnership with MNPS and to celebrate the accomplishments many have made over their eight years at LEAD Southeast.

Academics

Like all other LEAD schools, LEAD Southeast Middle and High School follows the educational model discussed in section 1.4 that is built on the belief that all students can excel when given the right opportunities and support. Students learn rigorous, standards-aligned content based in research-proven curricula designed to enhance problem solving and critical thinking skills necessary for college- and career-readiness.

Below are some notable achievement highlights for LEAD Southeast from 2021-2023:

- Outperformed MNPS on TCAP Social Studies assessments in both 2022 and 2023, and came within .2 points of meeting the district average in 2021.
- Outperformed MNPS on TCAP Science assessments in 2023.
- Outperformed both MNPS and the TDOE on first year math assessments at the high school level each year from 2021-2023
- Outperformed MNPS on Integrated Math End of Course assessments in 2022
- Met the district average in 2021 and outperformed on Integrated Math 3 End of Course assessment in 2023.
- Met the district average in 2022, exceeding both district and state averages in 2023 on the English 2 EOC.
- Outperformed MNPS on the Biology EOC in 2022 and both the district and the state in 2023.
- Outperformed both MNPS and the TDOE on the US History EOC from 2021-2023.

English I is a definite area of growth for LEAD Southeast Middle as is middle school ELA. This is being addressed through the measures listed in the above section. Current interim assessment results indicate that LEAD Southeast Middle is set to make significant progress in ELA in grades 5, 6 and 8 as well as in English I. Instructional leaders are working closely with teachers to address the projected drop in proficiency in grade 7 and in English 2, with an eye on the fact that the next interim assessments will cover more standards, giving us a better understanding of our students’ projected performance on TCAP assessments.

Subject	LSE TCAP 23	LSE IA 1	LSE IA 2
5th ELA	19.40%	29.00%	34.00%
6th ELA	10.60%	25.00%	27.00%

¹⁹ [2022-23 Accountability Results for LEAD Southeast](#), Tennessee Department of Education

7th ELA	23.10%	7.00%	17.00%
8th ELA	11.80%	16.00%	18.00%
Eng 1	18.55%	23.1%	25.9%
Eng 2	50.48%	31.8%	34.2%

Interim assessments in math, science and social studies show predominantly positive predictions for most grade levels and subject areas for year end TCAP assessments. Of the seventeen total assessments for middle schools and high schools for these subject areas, LEAD Southeast Middle is projected to demonstrate increased proficiency on ten of those assessments, comparable proficiency on one assessment, and is projected to achieve 68% proficiency in 5th grade social studies. Network and school instructional leaders have collaborated to analyze data and develop reteach plans for each subject/grade assessed and have identified strategies to raise achievement in the six areas currently off track to exceed last year's achievement on TCAP assessments. (Please see attachment EE for a full overview of Network Interim Assessment data.)

Considering the percentage of students classified as economically disadvantaged, English Language Learner, students with disabilities and/or black, Hispanic and Native American students included in our averages (historically performing lower than the MNPS averages), it is significant that LEAD Southeast Middle is performing at or above MNPS, and in several cases TDOE, averages. At LEAD Southeast Middle, all learning is driven by data, as teachers and staff constantly analyze student work and adjust instruction or provide individualized support accordingly.

Our approach has proven effective for preparing students for life beyond graduation so they can pursue their goals and thrive. A strong foundational education leads to success outside of school. LEAD works tirelessly with seniors and families to assure that graduating seniors have applied and been accepted to a 4 year college or university.

Culture

An effective educational environment cannot be limited to academics; thus, LEAD Southeast Middle and High School emphasizes social and emotional development as well. The foundation for this growth begins with the strong relationships that our teachers build with our students to create the space for this social-emotional growth. As measured in the most recent administration of LEAD's Student Survey, 86% of LEAD Southeast Middle and High School students agree that "Interactions between students and adults at my school demonstrate care and mutual respect." In addition to the relationships that our teachers build with their students in our core content classes, we have a specific focus on social-emotional development through our CREW structure. Every student at LEAD Southeast Middle and High School is part of a CREW – a smaller group of 15-20 students paired with one teacher for lessons on character traits, recent events, executive functioning skills and real life reflection. CREW is also a place where teachers do academic and wellbeing checks on their students to ensure that students' needs are addressed as a whole child. As measured in the most recent administration of LEAD's Student Survey, 88% of LEAD Southeast Middle and High School students agree that "My Crew cares about me."

LEAD Southeast Middle and High School's robust culture built to support social-emotional development is also evidenced in the students' strong attendance record at school. LEAD Southeast Middle and High School received a 4 for chronic absenteeism from 2018-2020 as a result of the absolute pathway (less than 4.5% chronically absent). The chronic absenteeism rate was 4.39%, 4.53% and 6.34% for those three years and our average daily attendance was above 96.45%. Like many schools, LEAD Southeast Middle and High School experienced an increase in chronic absenteeism during the pandemic. In 2021, chronic absenteeism rose to 7.2% during remote learning and jumped to 22.7% upon return to school in 2022. Still these averages were far below MNPS rates of 28.9% in 2021 and 29.7% in 2022.

LEAD Southeast Middle and High School is not alone in the struggle to encourage regular attendance; according to the CREDO State of the American Student released in Fall 2023²⁰, 72% of public schools nationally have reported significant increases in absenteeism since emerging from the pandemic, with at least 10% of students missing at least 5 or more days in a month in 2023. That is a 5% increase since 2020. Despite this national trend, we were highly concerned about the impact of student absences on the outcomes our students are capable of and deserve; thus, we strengthened our efforts to return student attendance to pre pandemic rates.

We have taken a multipronged approach to combat high chronic absenteeism rates at LEAD Southeast Middle and High School. The first step is ensuring that we have a school team member who is completely focused on ensuring students have the incentives and supports to make going to school each day a priority. We found that having this responsibility distributed among multiple team members was not having a strong effect, so we hired a manager of chronic absenteeism (CA) at the school level and worked with them to design and implement a CA program that focuses on chronic absenteeism and the truancy process. While this individual leads the process, they work collaboratively with an attendance team composed of our Family and Community Engagement liaison (F.A.C.E.), principal, director of school operations, school counselors, and office manager. This team meets biweekly to review current attendance data, monitor progress of students in attendance interventions, and proactively identify an action plan for students in specific attendance risk categories (e.g. 3-5 absences, 6-8 absences, etc). In addition to the required attendance and truancy processes, the attendance team is responsible for planning and implementing a comprehensive incentive plan, including daily, weekly, monthly, and quarterly incentives for various groups (e.g. high-risk students, students in targeted attendance categories, students with perfect attendance, students maintaining 95%+ attendance, etc.). As a result, our preliminary chronic absenteeism rate fell to 18.6% for 2023(as indicated on the MNPS Charter Performance Framework). This notable attendance record demonstrates LEAD Southeast Middle and High School was successful in prioritizing the social and emotional development of students as well as academic growth.

To ensure teachers feel the support needed to create strong school culture, we engage in extensive teacher development, including weekly meetings with coaches as well as one-on-one coaching. Additional components of the educational model focus on engaging families and opportunities for students that extend beyond traditional academics. Weekly surveys and weekly notes as well as monthly meetings of the Family Leadership Team help keep lines of communication between families and staff open. We also offer additional family

²⁰[The State of the American Student 2023](#), Center for Reinventing Public Education

engagement activities including workshops and other engagement events such as student-led conferences (SLCs), ELA night, Math/Science Night, Health Fair, ACCESS Night, Back to School Night, International Festival and Book Fair. We believe this intentional focus on school culture makes LEAD Southeast Middle and High School a great place to both work and learn. To this end, LEAD Southeast Middle and High School reported a teacher retention rate of 84% in 2023 and a student attrition rate of 6.2% according to the MNPS Charter School Performance Framework.

LEAD Southeast Middle and High School's strong success can be attributed to multiple factors. Three main drivers of success are coaching, data analysis, and focus on student engagement. LEAD Southeast Middle, along with LEAD Cameron Middle, pioneered the way for collaborative coaching, a practice that has been replicated across the network. The school intentionally hired instructional managers with expertise in core content areas as well as those focused on ExEd, EL and RTII. This facilitates a deeper understanding of high leverage strategies to reach all students as instructional leaders are able to collaborate to meet the needs of diverse learners in every content area. LEAD Southeast Middle and High School's practice of consistent analysis of assessment, attendance and behavior data and use of that analysis to drive academic and culture practice planning as well as staffing decisions has resulted in greater student outcomes. Finally, LEAD Southeast Middle and High School's strong focus on school culture has created an environment that is both warm and demanding. Students believe that they are known and celebrated for their unique identities, fostering their willingness to take academic risks and expand their thinking.

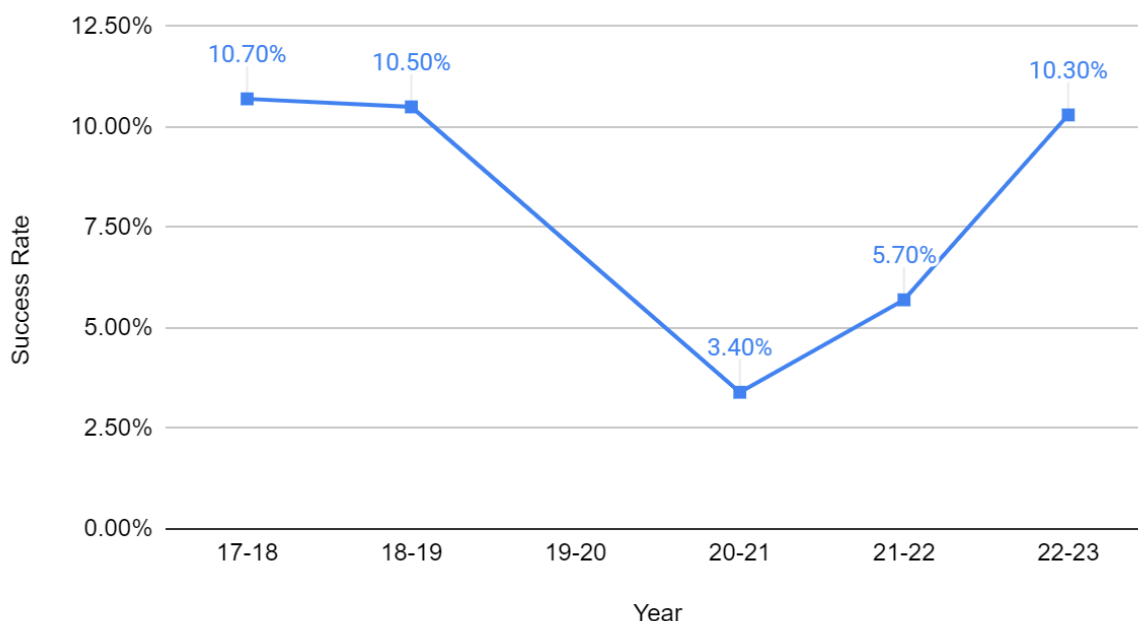
- b. Select one or more schools whose performance is relatively low or not satisfactory and discuss the school's performance. Be specific about the results on which you base your judgment that performance is unsatisfactory.
 - Describe the primary causes to which you attribute the school's problems.
 - Explain the specific strategies that you are employing to improve performance.
 - How will you know when performance will be satisfactory?
 - What are your expectations for satisfactory performance in terms of performance levels and timing?

LEAD Brick Church

Primary Causes of the Problem

Since its founding in 2012, LEAD Brick Church has made progress towards achieving its mission to ensure students are equipped with the knowledge and skills to succeed in college and in life. Still LEAD Brick Church remains the lowest performing school within the LEAD network and has experienced challenges with both higher than average student behavior and chronic absenteeism at levels. Prior to the pandemic, LEAD Brick Church achieved above average student growth, earning Level 4 TVAAS in 2017-2018 and Level 5 TVAAS in 2018-2019. The pandemic posed significant challenges for our students, as evidenced by both falling achievement and a growth score of Level 1. Since the pandemic, LEAD Brick Church has made steady gains in academic performance, with success rate steadily climbing from 3.4% to 5.7% to 10.3%. Ultimately, Brick met priority exit criteria in the 2022-23 school year, joining LEAD Cameron and LEAD Neely's Bend as the third school LEAD has transformed to improve academic performance. Still, LEAD Brick Church was reidentified with a Comprehensive Support and Improvement (CSI) under Tennessee's 2023 Federal Accountability Protocol.

Success Rate



While pleased with our progress toward our mission, there are a number of challenges that remain in regards to fully realizing our promise of preparing students for college and life. Our students have not yet recovered their proficiency levels from the pre-pandemic years and, while growth is strong, we must accelerate our students' absolute success rate in order to ensure that all students are prepared for college and career. Chronic absenteeism and previous high suspension rates have contributed to low student performance as, we believe, frequent turnover in leadership pre-pandemic. Brick Church has made numerous investments in the past several years, including staffing model changes, revised curricula, a strong coaching model, and enhanced support from the network. These investments are showing promising results from internal data, giving us confidence that Brick Church students will continue to see increased proficiency over the next charter term.

Specific Strategies to Remedy the Problem

Despite performing at or above both our peer schools in the Achievement School District, as well as showing strong results in both proficiency and growth within our local school cluster, we recognize that there is more work to do to raise LEAD Brick Church's performance to meet expectations. LEAD Brick Church is taking a multipronged approach to improving academic performance. We believe that there is no single solution to improve student performance and that, in order to turn around a school, it takes a holistic approach to student learning.

ELA

Reading Intervention

Data from the 2020-21 school year highlighted the need for intensive reading intervention for a significant number of our students. At the network level, a director of MTSS was hired to support and

evaluate reading intervention efforts across the network. The expanded intervention program was developed throughout the 2021-22 school year and fully implemented during the 2022-23 school year. Multiple reading interventionists have been hired across all network schools, including LEAD Brick Church. These interventionists are provided intensive initial training on their assigned curriculum and coaching to ensure fidelity of implementation throughout the year. The efficacy of this initiative is being monitored using a variety of nationally normed assessments as well as internally developed walkthrough tools.

Specifically, LEAD Brick Church expanded RTII programming to more than double the number of students in tiered reading intervention in Year 1 and adopted new scheduling to dedicate additional time to reading intervention using common curricula within each tier. At the end of the 2023 school year, the majority of students in Tier 2 and Tier 3 intervention at LEAD Brick Church were scoring promisingly at the 69th growth percentile as measured by Fastbridge's CBMReading, and 34 out of 125 students, or 27% enrolled in either Tier 2 or Tier 3 intervention, were able to exit to Tier 1 intervention.

Curriculum and TNReady Results

Also in 2021, school and network leaders recognized the need for more robust ELA curricular support. We sought the expertise of The New Teacher Project (TNT) whose mission is to end the injustice of educational inequality by providing excellent teachers to the students who need them most and by advancing policies and practices that ensure effective teaching in every classroom. With their help, we researched and adopted Reading Reconsidered, a novel centric curriculum focused on knowledge building and writing. Reading Reconsidered allows students to engage with text in three different ways: Accountable Independent Reading (silent, autonomous reading), FASE Reading (shared read-aloud between students and teachers), and Read Aloud (teachers reading texts out loud). We continued our partnership with TNT as we moved into curriculum implementation in 2022, and we also sought the expertise of Reading Reconsidered curriculum developers.

Post-pandemic, more than ever, strong Tier 1 instruction is the key to increasing student outcomes; thus, our network literacy director is supporting instructional managers in their development of teachers through strengthening the process of IPP (Intellectual Preparation Protocol) and data analysis.

Based on review of 2023 TNReady data, our school is also leading additional efforts to increase student outcomes in ELA including curriculum modification, refinement of ELA priorities, and enhancing teacher quality and development. For curriculum modifications, we are adjusting questions in lesson plans to mirror the language used in standards and state assessment and adding more multiple choice practice. We are also using Patterns of Power, a supplementary grammar curriculum, and network mid-unit essays including explicit writing instruction for all three types of essays (narrative, informational, and argumentative). We are in our third year of using the Reading Reconsidered curriculum and spent our summer professional development moving teachers from

using the curriculum with fidelity to using the curriculum effectively. This includes incorporating student autonomy, cultivating a culture of error so students feel safe to get the answer wrong and revise their response, and training teachers to plan rigorous exemplars and holding students to reaching those through back pocket questions. Lastly, we are improving our hiring process to ensure teachers are certified in literacy instruction and retaining effective teachers so we can continue to develop them in the curriculum year after year.

ELA Interim Assessments and MAP Reading

Data from LEAD Brick Church's ELA IA1 and IA 2 provided us with valuable information regarding areas of need for current students, with three grade levels showing encouraging growth and fifth grade showing projections below the previous year's TNReady scores. These results are preliminary and based on a limited number of standards. We believe the work outlined above will ultimately result in better outcomes for students across all grades that will be revealed on our third MVPA encompassing the majority of standards assessed throughout the year.

Math

LEAD Brick Church currently scores among the top of ASD middle schools in terms of math proficiency. Based on preliminary 22-23 results, we are optimistic that Brick Church will exceed the ASD proficiency rate for 22-23 and move closer to the district success rate for math. Brick Church has identified several strategies to dramatically improve math proficiency and return to a Level 5 growth for all students.

Intervention

In the 2022-2023 school year, under the direction of the network director of MTSS, math intervention was expanded much in the same way as reading intervention. Through a partnership with Blueprint Learning, math interventionists are utilizing Do the Math, a structured curriculum, to provide students opportunities to gain identified foundational math skills. Specifically at LEAD Brick Church, 22% of students are receiving Tier 2 and Tier 3 intervention services. Services are provided for 25 minutes each day within the student's scheduled math block. Students who do not participate in Do the Math interventions have intervention in the math classroom with the math teacher, a math interventionist, and/or an ExEd teacher. In the Tier 1 math intervention, students complete targeted grade-level skills practice in IXL and receive small group instruction on just-in-time grade level skills or critical foundational skills.

Curriculum

Data analysis in the 2019-2020 school year revealed the need for enhanced mathematics instruction and led to the adoption of Achievement First (AF) Math. We entered a partnership with AF Math to support curriculum implementation in the 2020-2021 school year and leveraged network experts to enhance teachers' skills in developing students' intellectual processing of math concepts. Support from AF Math continued through the 2022-2023 school year during which time we hired a network mathematics coordinator to target middle school math, enabling the director of mathematics to provide more assistance to high school math programs.

Students at LEAD Brick Church, and across the network, have seen increases in math proficiency over the past three years. Also encouraging is the trajectory of LEAD Brick Church's current 8th grade cohort, whose scores have consistently improved over a three-year period. We know that student mobility is a factor, yet, if we follow the data starting with students who were fifth graders in 2021, growth from 0% proficiency in 2021 to 7.8% proficiency in 2023 is evident. We see a similar trend with students who began as sixth graders in 2021 growing from a proficiency rate of 2.63% in 2021 to 10.6% in 2023, and from seventh graders who demonstrated proficiency in math at 1.16% in 2021 and had achieved a proficiency rate of 9.3% by their eighth grade year in 2022. This demonstrates that we consistently see year over year improvements in math for our student cohorts.

Math Interim Assessments and MAP Map

Data from our first math interim assessment have proven promising, as well, with three out of four grades predicted to show improvement on TCAP assessments. Immediately after each interim assessment, data were analyzed and reteach plans were developed. We compared data from this first interim assessment to the second interim assessment administered the week of December 11th to again determine bright spots and areas of need for students. Math emerged as an area of concern with scores in every grade but grade 8 dipping as more standards were assessed. The instructional manager responsible for math coaching and her supervising assistant principal of instruction are working closely with the Network math coordinator, director of exceptional education instruction and director of English learners to ensure teachers are equipped with the tools and strategies necessary to address gaps in student learning. MAP math data are used to inform educators about student needs in regards to foundational grade level skills. This data also supports student growth in mathematics, with a 5.03% reduction of students scoring between the 1st and 40th percentiles from Spring 2022 to Spring 2023. The most recent fall administration shows a further decrease of an additional 3.5%.

Science

Curriculum and TNReady Results

LEAD has to streamline systems through the adoption of common curricula in science and social studies in the 2023 school year. Implementation of StemScopes Science (described in section 1.4) began this year and is supported by the network's director of science as well as school-based science instructional managers. Network-led professional development regarding the curriculum and best practices for lesson planning and delivery was offered at the beginning of the school year and is scheduled throughout the year. Instructional managers from across the network meet bi-weekly to focus on common trends, and the director of science meets with individual instructional managers bi-weekly to continue the focus on planning.

Much like we see in mathematics, year to year increases in achievement on TNReady assessments are evident in science with the exception of the cohort of students who entered LEAD Brick Church as 7th graders in 2021 to their 8th grade year in 2022. Most notable is the increase of 11.85% for students in the 6th grade cohort 2021 to the eighth grade cohort in 2023.

Science Interim Assessments

Data from our first interim assessment have shown mixed results with two out of four grades predicted to show improvement on TCAP assessments. Immediately after each interim assessment, data were analyzed and reteach plans were developed. Data from the second assessment indicate scores projected to outpace TCAP 2023 in all grades with the exception of grade 8.

Social Studies

Curriculum and TNReady Results

While Gallopade had been used for several years as a resource across the network, it was formally and fully implemented this year as our common curriculum and is supported by the network's director of social studies as well as school-based social studies instructional managers. Network-led professional development regarding the curriculum and best practices for lesson planning and delivery was offered at the beginning of the school year and is scheduled throughout. Instructional managers from across the network meet bi-weekly to focus on common trends, and the director of social studies meets with individual instructional managers bi-weekly to continue the focus on planning.

Year over year performance on TNReady social studies assessments is mixed, with scores showing significant gains from 2021-2022 for students enrolled at Brick from grades 6 through 7, but a significant decrease in scores as students moved from grade 7 in 2022 to grade 8 in 2023. We see increases, however, in students enrolled at LEAD Brick Church for 6th grade in 2022 to their 7th grade in 2023. We saw an increase of just over 2% from the 7th grade cohort in 2021 to their 8th grade year in 2022.

Interim Assessments

Interim assessments show projections of increased achievement in grades seven and eight. As noted in the section on ELA above, these results are preliminary and based on a limited number of standards. We believe the intense focus on planning, supported by the network director of social studies and school-based instructional managers will ultimately yield more positive results. Data from the first interim assessment were reviewed at both the standard level and the item level, and reteach plans developed.

Subgroup Performance

To meet the requirements of our authorizer and our own internal goals, we have developed a number of strategies to improve ELL and ExEd results. LEAD Brick Church has taken a multi-pronged approach to improving subgroup performance both prior to, during, and after the pandemic. The steps we have taken are as follows:

- 1) Partnership with All Means All to expand our knowledge of fostering inclusive communities and equitable outcomes for all students.
- 2) Expansion of MTSS services including dedicated reading intervention and math intervention teachers supported by an assistant principal of instruction and an instructional manager. This assistant principal also serves as the school's ILP-D coordinator.

- 3) Adoption and implementation of common, rigorous curricula across ELA, math, social studies, science, math intervention, and reading intervention.
- 4) Additional administrative support in the form of two assistant principals and four instructional managers. Our instructional leadership team supports English learner and ExEd populations through subgroup-specific supports, e.g. coaching and compliance for English learner and ExEd staff, and through training, developing, and supporting all staff in meeting the needs of English learners and ExEd students, e.g. training in assistive technology tools, implementing accommodations, and instructional strategies for diverse learners within and across content areas.
- 5) At the network level, we added a director of exceptional education instruction to strengthen our focus on ensuring both exceptional education teachers as well as general education teachers are planning and executing instruction using high leverage strategies for teaching students with disabilities.
- 6) Continued focus on English learners and ExEd populations that reflects our changing student demographic as demonstrated through augmented curricula, network support and training in the development of effective ILPs, ILP-Ds and IEPs, differentiated MTSS options for all students but specifically the English learners and ExEd subgroups, work with Formative Language Assessments as predictors of student success on ACCESS, and work with interim assessments as predictors of English learners and ExEd students' successes on TCAP.
- 7) Expansion of our family council to better incorporate family voice into our educational practices. Due to this feedback, we have invested heavily in socio-emotional support in the form of additional support staff dedicated to counseling and family outreach. We also incorporate interpretation services live and via Language Link to ensure that all families are able to have a voice in their child's education and the school's practices.
- 8) Collaboration with the network director of student support whose job is specifically dedicated to working alongside the school in pursuit of success with all students, but specifically with our student subgroups and most vulnerable student populations.
- 9) Investment in data-driven instruction services that function within our curriculum to align assessment strategies, culminating in predictive interim assessments.
- 10) Implementation of the Student Needs Analysis Protocol (SNAP) process that allows school teams to review academic, behavior, and attendance data to determine students with the highest need for support and the appropriate interventions to meet their needs.

LEAD Brick Church has seen an increase in students with low-incidence disabilities increasing from two students eligible to participate in TCAP-Alt in 2021 to eight students in 2023. This has led to enhanced programming in our AIM (lifeskills) classroom, including additional staff, specialized supports and related services, use of the Unique Learning System curriculum, and a sensory space. Each student has a personalized schedule in 2023-2024 that includes opportunities for AIM students to participate with their peers in general education classrooms and social settings as per their IEPs. In 2022, 100% of tested students scored proficient on TCAP-Alt across all subject areas. In 2023, 100% of students

tested scored proficient in TCAP-Alt ELA, with 83.3% scoring proficient in TCAP-Alt math, science and social studies.

Chronic Absenteeism

LEAD Brick Church has intentionally focused on school culture to set the stage for accelerated academic success. Reducing both chronic absenteeism and suspension rates has been a key area of focus for us this year and we are seeing positive trends in both metrics. Prior to the pandemic LEAD Brick Church consistently had a chronic absenteeism rate averaging around 20%. During the pandemic chronic absenteeism peaked at 41%, well above the typical average. Brick Church is not alone in the struggle to encourage regular attendance; according to the CREDO State of the American Student released in Fall 2023, 72% of public schools nationally have reported significant increases in absenteeism since emerging from the pandemic, with at least 10% of students missing at least 5 or more days in a month in 2023. That is a 5% increase since 2020. Despite this national trend, we recognize that attendance has a direct connection with student outcomes and that we must do more to reduce our chronic absenteeism rate. We have taken a multipronged approach to combat high chronic absenteeism rates at LEAD Brick Church, the steps of which are outlined earlier in our application in section 1.8. As a result, chronic absenteeism is down 13 percentage points from the same point last year.

Future Goals

At the end of the 22-23 School Year, LEAD Brick Church achieved priority exit status and therefore met the eligibility to exit the Achievement School District. Despite this accomplishment, the results of LEAD Brick Church did not yet meet the performance framework of the TPCSC and was denied a 10 year charter renewal. The lessons learned from LEAD Brick Church have only strengthened our commitment to securing a K-12 pathway and to our level of preparedness to achieve our growth plans. Those lessons include:

- It can be very challenging to close the academic achievement gap between students coming in to our school significantly below grade level and to the TPCSC expectations in only three to four school years. At LEAD Brick Church, 46% of students in reading and 65% of students in math enter the school scoring in the bottom 20th percentile in MAP. Similarly, LEAD Cameron sees 52% in reading and 60% in math of students scoring in the bottom quintile. This is 2.5 to 3 times the number of students expected scoring at the bottom of readiness when coming into the school. Understanding this gap at LEAD Brick Church and at LEAD Cameron is one of the strongest arguments we have for launching LEAD Cameron Elementary. If we are achieving our mission at LEAD Cameron Elementary, it will dramatically improve the readiness of students coming in to our middle schools, thereby not just offering a great option for elementary families, but ensuring greater success at the middle, and eventually, high school, level.
- Fresh start charter schools, such as LEAD Cameron Elementary, ensure that our network has greater autonomy to recruit students. In the case of LEAD Brick Church, the local district closed down one of our two elementary feeder schools and rezoned a substantial portion of the remaining feeder to another middle school. Again, operating

a fresh start feeder elementary school will only increase the reliability of our enrollment at the middle school level.

- LEAD is proud of its TVAAS results across our network, as this is the best indicator of our schools showing outsized results for all students. However, this celebration of TVAAS is paired with a focus on also increasing proficiency results and ensuring that all students can achieve grade level standards. Our approach to both intervention and the use of data in our classrooms is a key component of pairing a focus on growth with that of proficiency.

4.3 - Performance Record: Operations

Authorizer Evaluations

- a. For all schools operating under another authorizer: provide, as attachments, the last two years of the following items produced by the authorizer(s) or by a third-party evaluator, if applicable:
 - Attachment GG: Performance Reports
 - Attachment HH: Evaluation Reports
 - Attachment II: Renewal Reports
 - Attachment JJ: Annual Reports

See attached.

Termination of Contracts

- a. List any contracts with charter schools that have been terminated by the network, charter management organization, the school's authorizer, or the school, including the reason(s) for such termination and whether the termination was for material breach.

We have not had any contracts that have been terminated by the network, the school's authorizer, or the school.

Performance Deficiencies

- a. List any and all charter revocations, non-renewals, shortened or conditional renewals, or withdrawals/non-openings of schools operated, and explain what caused these actions.

We have not had any charter revocations, non-renewals, or shortened or conditional renewals.

In 2015, LEAD sought and received amendment to our LEAD Academy charter to modify it from a 5-12 school to a 9-12 school. This was in response to the desire to use our facilities more efficiently and to move the middle school enrollment to a geographic area more closely aligned to students' homes. LEAD was able to absorb the middle school enrollment in other LEAD schools and enroll a greater number of high school

students as a result. This school had a history of exemplary performance, multiple years of Level 5 TVAAS, had very low attrition, and was a Reward School in 2015.

In January 2023, LEAD Public Schools was awarded a contract by the Achievement School District to open additional turnaround schools in the 2024-25 school year. In September 2023, LEAD was notified by the Achievement School District of the district's intent to delay the openings of these schools due to the delay in release of school accountability results.

- b. Explain any performance deficiencies or compliance violations that have led to formal authorizer intervention with any school operated in the last three years and how such deficiencies or violations were resolved.

Not applicable.

Litigation

- a. Identify any current or past litigation, including arbitration proceedings, that has involved the network, governing body, charter management organization, sponsor, or any charter schools it operates.
 - Provide, as Attachment KK, if not subject to confidentiality protection:
 1. the demand,
 2. any response to the demand, and
 3. the results of the arbitration or litigation.

Not applicable.

4.4 - Performance Record: Fiscal

Financial Statements

- a. For all schools operating in the state of Tennessee: provide the following in Attachment LL:
 - (a) the last two years of audited financial statements for each school or school(s); and
 - (b) the most recent internal financial statements, including balance sheets and income statements.

Part 3: Attachment Schedule

Please include attachments labeled according to the following schedule:

Section 1 Attachments: Academic Plan and Design

Attachment	Section	Description	Required	Guidance
A	1.3	Foundational Literacy Skills Plan	Yes	Use the department developed FLSP Guidance Toolkit to create a plan that is aligned with the rubric by which Foundational Literacy Skill Plans are reviewed and approved
B	1.6	Annual Academic Calendar	Yes	In accordance with Tenn. Code Ann. § 49-6-3004
C	1.6	Daily Schedule	Yes	In accordance with Tenn. Code Ann. § 49-6-3004
D	1.8	Student Handbook and Required Forms	Yes	
E	1.8	Student Discipline Policy	Yes, if not included in Attachment D	Included in Attachment D (student handbook)
F	1.9	<u>Enrollment Policy</u>	Yes	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 Tenn. Code Ann. §49-13-107; • Any proposed articulation agreements, pursuant to Tenn. Code Ann. § 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.
G	1.10	<u>Letters of Support</u>	Yes	

Section 2 Attachments: Operations Plan and Capacity

Attachment	Section	Description	Required	Guidance
H	2.1	Articles of Incorporation	Yes	
I	2.1	Proof of Non-Profit and Tax-Exempt Status	Yes	
J	2.1	By-laws	Yes	
K	2.1	Code of Conduct	Yes	
L	2.1	Conflict of Interest Policy	Yes	
M	2.1	Board Member Resumes or Biographies	Yes	
N	2.1	Board Policies	Yes	
O	2.4	Organizational Chart: Year 1	Yes	
P	2.4	Organizational Chart: Full Capacity	Yes	
Q	2.4	School Leader Resume (<i>if hired</i>)	<i>If available</i>	
R	2.4	Student Achievement Information (<i>if available</i>)	<i>If available</i>	
S	2.4	Employee Manual and Personnel Policies	Yes	
T	2.6	Insurance Coverage	Yes	
U	2.10	CMO Agreement	<i>If available</i>	
V	2.11	Annual Report	<i>Yes, for Categories 2, 3, & 4</i>	
W	2.12	Organizational Chart: Year 1		
X	2.12	Organizational Chart: Year 3		
Y	2.12	Organizational Chart: Year 5		
Z	2.15	Previously Approved and Authorized Application for School Being Replicated	<i>Yes, if seeking replication of school</i>	

Section 3 Attachments: Fiscal Plan and Capacity

Attachment	Section	Description	Required	Guidance
AA	3.1	Budget Worksheet	Yes	
BB	3.2	Budget Narrative	Yes	
CC	3.3	Network Financial Plan	Yes, for Category 2- 4	

Section 4 Attachments: Portfolio Review and Performance Record

Attachment	Section	Description	Required	Guidance
DD	4.1	Portfolio Summary	Yes, for Category 3 & 4	Utilize template on department website and directions located in Section 4.1
EE	4.2	Student Achievement: Internal Assessments		Provide detailed student achievement and growth results for each school that was operated, including results for grade levels not tested on state assessments.
FF	4.2	Student Achievement: State Assessments		
GG	4.3	Performance Reports		For all schools operating under another authorizer: provide, as attachments, the last two years of the following items produced by the authorizer(s) or by a third-party evaluator, if applicable:
HH	4.3	Evaluation Reports		
II	4.3	Renewal Reports		
JJ	4.3	Annual Reports		Provide the demand, any response to the demand, and the results of the arbitration or litigation.
KK	4.3	Litigation Documents		
LL	4.4	Audited Financial Statements	Yes, for Category 3 & 4 with schools operating in Tennessee	Include the last two years of audited financial statements for each school or school(s); and the most recent internal financial statements, including balance sheets and income statements.

Schedule of Attachments (Modified Attachments Highlighted in Yellow)

A. Foundational Literacy Skills Plan
B. Annual Academic Calendar
C. Daily Schedule
C. Instructional Master Schedule.docx
D. Student Handbook/School Forms
E. Discipline Table
F. Enrollment Policy
G. Letters of Support (16)
H. Articles of Incorporation
I. Proof of non-profit and tax-exempt status
I. Certificate of Existence

I.Name Change
J.By-laws
M.Board Member Resumes or Biographies
O,P,W,X,Y.Organizational Charts
Q.School Leader Resume
R.Student Achievement Information
S.Employee Manual/Personnel Policies
T.Insurance Coverage
V.Annual Report
AA.Budget Worksheet
BB.Budget Narrative
BB. Facilities Financing Assumptions
BB. Accounting Policies
CC.Network Financial Plan
DD.Portfolio Summary
EE.Student Achievement: Internal Assessments
FF.Student Achievement: State Assessments
GG. Performance Reports- 22.23mnps and 21.22 asd
GG.Cameron Annual Performance Framework_20.21.pdf
GG.LEAD Academy Annual Performance Framework_20.21.pdf
GG.LEAD Southeast Annual Performance Framework_20.21.pdf
LL.Audited Financial Statements
LL.Audited Financial Statements- most recent balance sheet and income statement
LL. 2023 Audit.pdf
MM.LEAD School StartUp Plan
NN.Capacity Interview Presentation
PP. Notification to MNPS on scoring of Section 4.2
OO.LEAD Leadership Development



LEAD Public Schools
Elementary Foundational Literacy Skills Plan

Daily Foundational Literacy Skills Instruction in Grades K-2

LEAD Public Schools literacy instruction is anchored in TN Foundational Skills Curriculum (TNFSC) and Amplify's Core Knowledge Language Arts (CKLA) program, aiming to enhance reading, writing, listening, and speaking skills in students. The curriculum materials are selected from those approved by the state Textbook and Instructional Materials Quality Commission.

The curriculum for grades K-2 in TN Foundational Skills focuses on instructing students in print concepts, phonological awareness, phonics and word recognition, word composition and spelling, fluency, and sentence composition. TNFSC adheres to evidence-based reading research and has been thoughtfully designed to establish a strong foundation for early literacy. Employing a systematic and explicit instructional approach, the curriculum ensures that all students acquire the essential skills needed to become proficient readers. We've allocated a dedicated time block (minimum of 60 minutes daily) for foundational skills in grades K-2, resulting in a total of 150 minutes per day dedicated to an integrated ELA block. TNFSC is defined by the following principles:

- **Explicit Phonics:** In this approach, educators clearly and systematically teach students the rules and patterns of phonics, emphasizing the direct connection between letters and sounds.
- **Synthetic Phonics:** This method involves explicit teaching of the relationship between letters (graphemes) and their associated sounds (phonemes). The focus is on blending sounds together for reading and segmenting them for spelling.
- **Intensive Practice:** Building reliability and automaticity is achieved through repeated oral practice with text aligned to the specific skills being learned.

CKLA is an educational program that aims to cultivate strong literacy skills through a structured and cumulative approach to both skills and content. It underscores the importance of background knowledge in the development of literacy. The CKLA literacy program includes systematic instruction, rich content, vocabulary development, fluency, writing skills, grammar, reading comprehension strategies, listening and speaking, as well as literacy assessments.

Within the program, the program targets reading comprehension skills, aiming to develop students' ability to understand and analyze various texts, including both fiction and non-fiction. Through a comprehensive approach, CKLA seeks to provide students with a well-rounded foundation in literacy, encompassing various aspects of language arts.

Additionally, there is a focus on vocabulary building, incorporating activities to enhance students' language skills by exposing them to a diverse range of words and their meanings. Writing skills are also emphasized, with students guided in developing their ability to write sentences, short paragraphs, and eventually more complex compositions.

Daily Foundational Literacy Skills Instruction in Grades 3-5

In grades 3-5, there is an integrated 120-minute reading block, with 30 minutes specifically dedicated to foundational skills instruction, aligning with Tennessee English Language Arts (TN ELA) standards, utilizing Amplify's Core Knowledge Language Arts (CKLA) curriculum. This focused instruction targets advanced phoneme recognition, multisyllabic words, advanced word analysis, and fluency.

Within our integrated ELA block, which adheres to an evidence-based approach for applying foundational skills in daily lessons, our students receive a comprehensive 120 minutes of ELA instruction. Each day's instruction consists of two key components: knowledge-building, encompassing approximately 90 minutes, and foundational skills instruction, which includes fluency, grammar, morphology, spelling, and writing, allotted for at least 30 minutes per day. Our adopted curriculum is designed to actively involve students in activities related to fluency, vocabulary, and comprehension. Importantly, these essential skills are not taught in isolation but are seamlessly embedded within the lesson, ensuring continuity, cohesion, and meaningful connections.

For instance, our third-grade students will participate in a unit titled "Astronomy: Our Solar System and Beyond." This unit serves to activate their prior knowledge on astronomy while introducing new information about this scientific field. Students engage with on-grade level, complex texts through independent reading, daily read-alouds, or paired readings. The unit seamlessly integrates spelling, dictionary skills, grammar, morphology, and writing with the core knowledge of astronomy.

Within the unit, students delve into words featuring various spelling patterns of /j/. They further enhance their proficiency in dictionary skills, including the application of guide words. Grammar activities involve reviewing conjunctions "and" and "because" and introducing new ones like "so" and "or." Morphology lessons focus on common suffixes such as -ful and -less, allowing students to apply their knowledge when encountering unfamiliar words in both text and content. The formal writing component of the Astronomy unit unfolds as a multi-day informative project, challenging students to describe a day in the life of an astronaut on the International Space Station. This unit not only refines their skills but also significantly contributes to expanding their knowledge of astronomy.

Approved Instructional Materials For Grades K-2

Amplify - K-5 Core knowledge Language Arts

Approved Instructional Materials for Grades 3-5

A. Foundational Literacy Skills Plan

Amplify - K-5 Core knowledge Language Art

Universal Reading Screener for Grades K-5. This screener complies with RTI² and Say Dyslexia requirements.

LEAD Public schools leverages the NWEA Map assessment three times annually as an initial universal screening tool for student progress. Alongside the NWEA MAP assessment LEAD Public Schools utilizes the Fastbridge suite of Universal literacy screening tool to fulfill the RTI and Say Dyslexia requirements. In turn, teachers and instructional leaders identify and provide interventions to support those students who have a significant reading deficiency. Once students have taken the NWEA Map assessment, a secondary and sometimes tertiary assessment is given to identify the specific area of deficit. Students scoring below the 25th percentile nationally, are given the AUTOREading assessment to assess basic reading skills including letter naming, decoding and identification. In addition, they are given the EASY CBM reading assessment to assess fluency.

Intervention Structure and Supports

Our school district follows the guidelines outlined in the state's RTI2 model to identify and support students deemed "at-risk" for reading difficulties. In the fall, students in grades K-5 undergo a universal reading screening using NWEA Map. After a thorough examination of the data obtained from these universal screeners, grade-level teachers and building data teams convene to identify students scoring below the 25th percentile. Those demonstrating a need are classified into Tier II (11 – 25 percentile) or Tier III (1 – 10 percentile). Students assigned to receive Tier II or Tier III instruction undergo additional diagnostic assessments to pinpoint specific deficits. This information helps building data teams place students into small intervention groups, addressing the most significant areas of reading deficiency.

LEAD schools incorporate a daily, minimum 45-minute grade-wide period where students receive additional support tailored to their individual needs. In this timeframe, students may engage in skills-based Tier II, III, or Special Education Interventions; reinforcement or remediation aligned with standards; English Language Support; or enrichment activities. This dedicated block ensures that supplemental support goes beyond Tier I and facilitates strategic grouping across classrooms to address specific student needs. The evidence-based literacy interventions focus on bridging skill gaps in basic reading, reading fluency, reading comprehension, and written expression. The criteria specific to dyslexia encompass those detailed in the TN Dyslexia Resource Guide.

Interventions' effectiveness is gauged through the utilization of FAST CBMs, along with program-specific and other instructional assessment data. Progress monitoring measures are closely aligned with the skill area(s) targeted by the interventions. School-level data teams convene every five weeks, employing data-driven decision-making to guarantee that individual students are making satisfactory progress through the interventions. These teams scrutinize progress monitoring data to guide decisions related to the duration, materials, and intensity adjustments when a student is not demonstrating progress.

Parent Notification Plan/Home Literacy Reports

LEAD Public Schools implements a thorough notification plan wherein we regularly share progress with families and notify them of being “at-risk” and in need of additional support. The goal of these communications is to provide an up-to-date assessment regarding their students current performance levels through sharing those scores in a parent friendly manner. As such, given the diversity of our students and families all communications are provided in two primary languages (English and Spanish) with additional communications being provided in Arabic as needed. LEAD invests in these additional steps to ensure our families have access to clear and accessible updates regarding their student performance. LEAD leverages a combination of both written updates and in- person face-to-face meetings to ensure appropriate support and communication is in place to ensure student success. For written communication after each round of our universal screening assessments that occur September, January and May LEAD provides each student and family a comprehensive report. In addition, parents receive supplemental communications outlining the specific skills gaps students need to address, how extensive they are and how LEAD will support these programs targeted intervention programming. These scores will indicate a specific level of grade level mastery and throughout LEAD's communication the importance of third grade reading proficiency is highlighted. In addition to LEAD support, parents are provided with no-cost resources to support these learning activities at home. As noted above, these screening assessments are taken three times annually and parents can expect three corresponding communications shortly thereafter. Alongside these communications parents are provided with regular progress reports and quarterly report cards. Students receiving additional support through intervention will also receive updates every 4.5 weeks documenting their students progress during that time. In addition to written notification, LEAD hosts notice of concern meetings in the Fall (October) and Spring (January) annually to discuss student progress in-person with the student alongside parents and guardians. These face to face meetings are a critical part of the growth and development of students and ensure a team of support and intervention surrounds the student.

Professional Development Plan

K-5th grade teachers at LEAD will participate in training supported by the Reading 360 Early Literacy Training series developed by the Tennessee Department of Education. LEAD will integrate the Reading 360 Early Literacy Training Series into our professional development calendars we've crafted for the school year. In June 2025, our plan for providing PD for all teachers is as follows: in June 2025 members of our Network Academic team will join the Reading 360 Week 1 training asynchronously. Academic leaders will then leverage this training coupled with explicit training focused on foundational skills to ensure all teachers have received the appropriate level of training and support as outlined by the legislation. These training sessions will concentrate on building a solid foundation in reading development and instruction, emphasizing a phonics-based approach. Educators who are new to LEAD must also complete the Early Literacy Training Course 1 within their initial year of employment.

In addition, during LEAD's summer planning, K-5th grade teachers will be required to unpack the first unit of their curriculum. This unpacking of unit planning and daily lesson plans involves isolating explicit instances of vocabulary instruction, engaging in closed reading both orally and independently, and providing opportunities for students to demonstrate their understanding. LEAD also offers various virtual training sessions covering elements of WIDA support, assistance for English Language Learner (ELL) students, and support for students with exceptional needs. This training will be incorporated into our central repository of resources.

B. Annual Academic Calendar

KEY DATES (updated for 23-24)

July 2023						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August 2023						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September 2023						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

October 2023						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November 2023						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December 2023						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January 2024						
S	M	T	W	T	F	S
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February 2024						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March 2024						
S	M	T	W	T	F	S
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3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April 2024						
S	M	T	W	T	F	S
	1	2	3	4	5	6
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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May 2024						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June 2024						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

FALL SEMESTER (83 student attendance days)
 Jul 4: Independence Day observed (Network Holiday)
 Jul 17: School-Year Staff Report
 Jul 17-Aug 7: LEAD University (Staff PD)
 Aug. 3: General Election day (No After-school events)
 Aug. 8: First full day of School Grades 1-12 (Half Day for Kindergarten)
 Aug. 9: Half Day for Kindergarten
 Aug. 10: First full day for Kindergarten
 Sept. 1: Stockpiled PD day (Students do not report)
 Sept. 4: Labor Day observed (Network Holiday)
 Sept. 5: Progress reports issued
 Sept. 14: Stockpiled PD day (Students do not report) (Possible General Election Run-off)
 Oct. 5: First quarter ends
 Oct. 6: Stockpiled PD day (Students do not report)
 Oct. 9-13: Fall break holiday
 Oct. 16: Second quarter begins
 Oct. 24: Report cards issued
 Oct. 27: PD/Parent conference day (Students do not report)
 Nov. 10: Veterans Day observed (Network Holiday)
 Nov. 14: Progress reports issued
 Nov. 22-24: Thanksgiving holiday (Network Holiday)
 Dec. 14-19: Half day for exams grades 9-12; Full day for 5-8 & All Staff
 Dec. 20: Early release day for All Students & All Staff; Second quarter ends
 Dec. 21-Jan. 3: Winter break holiday for All Students & All Staff (Network Holiday)

SPRING SEMESTER (90 student attendance days)
 Jan. 4-5: PD day (Students do not report)
 Jan. 8: Third quarter begins
 Jan. 15: MLK holiday (Network Holiday)
 Jan. 16: Report cards issued
 Feb. 13: Progress reports issued
 Feb. 19: Stockpiled PD day (Students do not report)
 March 5: Stockpiled PD day (Students do not report) Presidential Primary Election (Tentative)
 March 8: Early Release Day for All Students & All Staff; Third quarter ends
 March 11-15: Spring break holiday (Network Holiday)
 March 18: Fourth quarter begins
 March 26: Report cards issued
 March 29: Spring holiday (Network holiday)
 April 16: Progress reports issued
 May 17-22: Early Release day for exams grades 9-12; Full day for 5-8 & All Staff
 May 23: Early Release day for all students; Exams grades 9-12; Full Day for All Staff; End of school year; Report cards issued (middle schools)
 May 24: PD/in-service Day for All Staff; Last Day of School Year for School Year Staff
 May 27: Memorial Day observed (Network holiday)
 May 30-June 28: Summer Programs
 June 19: Juneteenth observed (Network holiday; No Summer Programs)

Potential snow make-up days: Feb. 19, March 5, May 24, 28, 29, 30, 31

Calendar Key

	Students in school		Early release day for students AND early release day for staff
	Students out of school; Working/PD Day for All Staff		Early release day for all students; Full Working Day for all Staff
	Students out of school; All Staff Holiday		Early Release day for student exams (grades 9-12 only); Full day for 5-8 and all staff
	Students out of School; School Year Staff on Holiday; Calendar Year Staff Working Days		
	Summer Programs Available; Students out of School, School Year Staff on Holiday; Calendar Year Staff Working Days		

Instructional Master Schedule

<i>K</i>	7:45-8:00	8:00-8:05	8:05-8:20	8:20-10:50		10:50-11:20	11:20-12:20	12:20-1:05	1:05-1:25	1:25-1:55	2:00-3:00
	Breakfast in the classroom	Morning Announcements	Morning Meeting	Literacy Block 150 minutes		Lunch	Math 60 minutes	RTII Personalized Learning Time	Recess	Science & Social Studies	Related Arts
<i>1st</i>	7:45-8:00	8:00-8:05	8:05-8:20	8:20-10:50		10:20-11:20	11:30-12:00	12:00-12:30	12:30-12:50	12:55-1:55	2:00-3:00
	Breakfast in the classroom	Morning Announcements	Morning Meeting	Literacy Block 150 minutes		Math 60 minutes	Lunch	Science & Social Studies	Recess	Related Arts	RTII Personalized Learning Time
<i>2nd</i>	7:45-8:00	8:00-8:05	8:05-8:10	8:10-10:40	10:40-11:00		11:00-11:30	11:30-12:30	12:30-1:45	1:45-2:30	2:30-3:00
	Breakfast in the classroom	Morning Announcements	Morning Meeting	Literacy Block 150 minutes	Recess		Lunch	Related Arts	Math 75 minutes	RTII Personalized Learning Time	Science & Social Studies
<i>3rd</i>	7:45-8:00	8:00-8:05	8:05-8:10	8:10 – 10:05	10:05-11:05	11:05-11:25	11:25-11:45	12:15-1:45	1:45-2:30		2:30-3:00
	Breakfast in the classroom	Morning Announcements	Morning Meeting	Literacy Block 115 minutes	Related Arts	ELA Cont. 20 minutes Total 135 min.	Recess Lunch 11:45-12:15	Math 90 minutes	RTII Personalized Learning Time		Science & Social Studies
<i>4th</i>	7:45-8:00	8:00-8:05	8:05-8:15	8:15-9:00	9:05-10:05	10:00-12:15	12:15-12:45		12:45-1:00	1:00-2:30	2:30-3:00
	Breakfast	Morning Announcements	Morning Meeting	RTII Personalized Learning Time	Related Arts Planning	Literacy Block 135 minutes	Lunch		Recess	Numeracy 90 minutes	Science & Social Studies
<i>5th</i>	7:45-8:00	8:00-8:05	8:05-9:05	9:05-9:15	9:15-11:30	11:30-11:45	11:45-12:30		12:30-1:00	1:00-2:30	2:30-3:00
	Breakfast	Morning Announcements	Related Arts	Morning Meeting	Literacy Block 135 min.	Recess	RTII Personalized Learning Time		Lunch	Numeracy	Science & Social Studies

C. Instructional Master Schedule

C. Daily Schedule

The schedule tables provided below are based on the mandatory time frames outlined by the state of Tennessee. They do not constitute a finalized master schedule but rather serve as a preliminary structure to ensure alignment with state regulations. Adjustments and refinements will be made as necessary to create a comprehensive master schedule that meets the needs of all stakeholders.

LEAD Southeast Elementary Daily Schedule K-1st	
	Subject Minutes
	Morning Meeting (SEL) 15 minutes
	Related Arts 60 minutes
	ELA 150 minutes
	Lunch 30 minutes
	Science/Social Studies 30 minutes
	Math 60 minutes
	Recess 20 minutes
	MTSS 45 minutes
	Closing Circle (SEL) 10 minutes

LEAD Southeast Elementary Daily Schedule 2nd		
	Subject	Minutes
	Morning Meeting (SEL)	10 minutes
	Related Arts	60 minutes
	ELA	150 minutes
	Lunch	30 minutes
	Science/Social Studies	30 minutes
	Math	75 minutes

Recess 20 minutes

MTSS 45 minutes

LEAD Southeast Elementary Daily Schedule 3rd-5th		
	Subject	Minutes
	Morning Meeting (SEL)	10 minutes
	Related Arts	60 minutes
	ELA	135 minutes
	Lunch	30 minutes
	Science/Social Studies	30 minutes
	Math	90 minutes
	Recess	20 minutes
	MTSS	45 minutes

LEAD Southeast Elementary

Address TBD

School Principal: TBD

Grades: K-5

Main Number: (615)xxx-xxxx

Website: xxxxxxxx

The content that follows is the LEAD Southeast Elementary Appendix to the LEAD Public Schools (LPS) Student and Family Handbook. The information is in addition to what is stated in the LPS and the Metro Nashville Public Schools Student and Family Handbooks, NOT in place of. All school stakeholders-- staff, students, and families -- are accountable to and for the information included in all three sections: MNPS handbook, LPS handbook, and LEAD Southeast Elementary Appendix.

Principal's Welcome Message

Dear LEAD Southeast Elementary School Families,

I am thrilled to extend a warm welcome to each and every one of you as the proud principal of LEAD Southeast Elementary School! This marks the realization of a long-standing dream for the LEAD Public Schools Network, and we are honored to provide a continuum of high-quality K-12 education.

As we embark on this exciting journey together, my enthusiasm is fueled by the prospect of partnering with you to nurture exceptional growth. Our focus this academic year revolves around the theme "Ready for School, Ready for Life," perfectly aligned with our overarching mission. Recognizing that elementary education lays the foundation for future learning, we are excited to collaboratively build the leaders of tomorrow.

In our commitment to fostering a positive and respectful culture within our school, we will concentrate on cultivating an environment grounded in positivity, strong relationships, and consistency. We understand that this is not just a school; it's a place where your child needs to feel a sense of belonging. Our goal is for your students to eagerly step into the building each day, surrounded by caring adults who believe in them, and to share in the joy of learning with their friends and classmates. Expect regular updates from us as we share the progress and initiatives happening within our school.

I firmly believe that LEAD Southeast Elementary School will be the very best place in Nashville to learn, surrounded by the very best people ready to partner with you on this educational journey. I am eagerly anticipating the opportunity to meet each of you in person soon. In the meantime, please do not hesitate to reach out if you have any questions or concerns.

Sincerely,

[Your Full Name]

Principal

LEAD Southeast Elementary School

XXX

Principal, LEAD Southeast Elementary

Phone

Email

General Information

Staff Name	Title	Email
	Principal	
	Assistant Principal of Students	
	Assistant Principal of Instruction	
	Student Support Coordinator	
	Counselor	

Callouts

LEAD Southeast Elementary uses a callout system to share important news and information with families. If you are not receiving any calls, contact LEAD Southeast Elementary to update your contact information. If your phone number changes, please update the front office.

Parking

When visiting LEAD Southeast Elementary, please park in one of the available parking spaces in the parking lot in the front or the side of the building.

Policies are subject to be modified or added throughout the school year. The most updated handbook is available at our website or by request in the front office.

Calendar

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LEAD Southeast Elementary's Mission and Vision

Mission

LEAD Southeast Elementary is dedicated to shaping the educational foundation of students, equipping them with essential skills for success in both college and life. Our school is the nurturing ground where students foster their innate love for learning and exploration. It is here that students begin to form a sense of themselves as learners, embarking on a journey towards being Ready for College and Ready for Life.

Vision

At LEAD Southeast Elementary School, our goal is to provide a strong foundation for all students, regardless of their family's income or zip code. We focus on preparing students for success in both college and careers through key elements such as college and career readiness, a research-based curriculum, individualized learning for accelerated results, social-emotional learning based on the LEAD Ethos, honoring culture and student identity, and a dedicated school staff committed to excellent student outcomes. Our approach aims to create an inclusive and supportive environment where every student feels welcomed and encouraged on their educational journey.

Ethos

Students at LEAD Southeast Elementary learn and apply the values of **Commitment, Courage, Discipline, Self-Reliance, and Service to Others**. These principles build a strong community, promoting self-efficacy, independence, and social skills. Celebrations of learning reinforce students' pride in their achievements.

Ethos	Definition	Examples
Commitment	When you promise to do something and stick to it, even when it's tough.	- Completing homework on time - Showing up to school every day ready to learn
Courage	Being brave and facing challenges or fears, even when it's scary.	- Speaking up in class, even if you're nervous - Standing up for what is right
Discipline	Having self-control and sticking to your plans to achieve your goals.	- Following a study schedule to improve your grades - Limiting screen time to focus on important tasks
Self-Reliance	Being independent and confident in yourself, trusting that you can handle challenges.	- Solving a problem on your own before asking for help - Taking responsibility for your own belongings and actions
Service to Others	Helping and caring for people in your community or beyond.	- Helping a classmate with their schoolwork. - Doing something kind for a friend or family member

Academics

LEAD Southeast Elementary's Vision for Effective Teaching

At LEAD Southeast Elementary School, we envision a dynamic and inclusive learning environment characterized by a positive and supportive culture. Our unwavering commitment to a standards-driven approach ensures our instructional strategies are aligned to TN State Standards and our own rigorous internal goals. Data is not just a tool; it serves as the guiding compass for our instructional decisions, allowing us to promptly address the distinct needs of each learner.

We believe our students' academic success is inherently linked to social and emotional development. All students will participate in social-emotional learning and character-building lessons. Our curriculum includes research-based social and emotional skills training that aligns with LEAD's Ethos. As students' progress through LEAD Southeast Elementary, they will build the academic knowledge and social-emotional skills needed to succeed in middle school, high school, and beyond.

Homework Policy and Expectations

The purpose of homework is to strengthen skills taught in the classroom and instill positive study habits. Homework will be assigned Monday-Thursday. Families can support homework expectations by establishing consistent routines so that homework can be completed. Families are encouraged to reach out to teachers with any questions about homework.

Grading Scale

Kindergarten

Kindergarten students at LEAD Southeast Elementary receive a quarterly report detailing their mastery of essential concepts and skills. Teachers will provide families with specific data and feedback, offering guidance on how to support student growth and development at home.

Rubric	Performance Level
E	Exemplary
S	Satisfactory
P	Progressing
U	Unsatisfactory
N	Needs Improvement

1st - 5th Grade

Starting in 1st grade, students receive quarterly letter grade report cards according to their percentage mastery of measured concepts. Grades are determined by performance in class and on various assessments, ensuring that students have independently mastered the required skills.

Report Card Grading Scale

Grade	Range
A	90-100%
B	80-89%
C	70-79%
D	60-69%
F	0-60%

Weighting system used for academic components	
35% Major Summative Assessments	• End of Unit/Module Assessments • Interim Assessments • Writing Rubric Scores
35% Minor Summative Assessments	• Reading Checkpoints • Math Topic Assessments • Quizzes
30% Daily Assignments	• Daily Assessments (Exit Tickets) • Classwork

Academic Testing

At LEAD Southeast Elementary, we utilize multiple data points throughout the year to ensure students are mastering content appropriately. Assessments taken are outlined below.

Assessment Name	Time of Assessment	Purpose of Assessment
Universal Screeners (MAP, FastBridge)	Fall, Winter, Spring	Screens students for potential academic gaps; compares student performance to students around the country to ensure college readiness
TCAP TNReady Assessment (Grades 3-5)	Spring	Determines whether students meet state academic proficiency requirements

Interim Assessments	3 times per year (ELA, Math, Social Studies, and Science)	Determines whether students have mastered and retained grade level content learned in class
Unit Assessments	At the end of each content unit (ELA, Math, Social Studies, Science)	To determine whether students have mastered recently taught grade level content
Progress Monitoring	Weekly	Quick screeners that are tracked to determine if academic interventions are working. This will not be used for all students.
Formative Language Assessment (EL students)	3 times per year	Tracks progress in reading, writing, speaking and listening proficiency
WIDA ACCESS (EL students)	Spring	Evaluates students in speaking, reading, writing, and listening proficiency

Academic Progress Reports and Report Cards

Quarterly report cards serve as a formal transcript and are designed to inform parents/guardians of their student's academic growth, as well as any potential academic problems or challenges their student may be experiencing. Report cards are one indicator of mastery of grade level content and readiness for the next grade.

We are committed to fostering open communication between our school and families. To facilitate this, progress reports will be distributed at the midpoint of each quarter. Additionally, comprehensive report cards will be sent home at the end of each grading period. The purpose of quarterly report cards is to update parents/guardians on their student's academic progress and highlight any potential academic challenges. Report cards serve as one indicator of mastery of grade-level content and readiness for the next grade.

In instances where academic concerns arise, our teachers and staff will proactively reach out to families to discuss strategies for improvement. Emphasizing the importance of collaboration, we pledge to maintain regular communication regarding student progress. We encourage families to actively review report cards and operate as highly valued partners in reinforcing positive performance or intervening when necessary to address their student's learning needs. Through this shared commitment, we aim to create a supportive and engaging educational environment for all stakeholders.

Celebrating Academic Progress and Achievement:

We believe that fostering a culture of joyful celebration is crucial for motivating our young learners. At LEAD Southeast Elementary, we make a point to celebrate various achievements, including Honor Roll recognitions, growth and accomplishments on assessments, social-emotional milestones, teacher accomplishments, and most improved performances. We firmly believe that a celebratory culture, centered on academic mastery, serves as a powerful driver for sustained motivation and a positive learning environment. By acknowledging and celebrating diverse accomplishments, we aim to instill a sense of pride, motivation, and enthusiasm among our students, creating a conducive atmosphere for continuous academic growth and success.

Academic Interventions and Supports

At LEAD Southeast Elementary, we are grounded in the belief that every student has the potential to excel academically. We understand that each student is unique, and some students will require more specific or in-depth academic interventions in order to experience that success. We will utilize the following interventions and supports:

In-Class Interventions

Our staff strive to make content accessible to students in the general education classroom daily. When students face challenges mastering content, teachers offer immediate corrections and constructive feedback for improvement. Academic feedback is tracked to identify patterns that may indicate further academic gaps. These interventions may include: one-on-one tutoring, peer tutoring, small groups, verbal and nonverbal prompts, and preferential seating.

Multi-Tiered System of Support- Academic (MTSS-A)

Students will take Universal Screeners each fall, winter, and spring to assess their performance relative to peers nationwide. Students falling below the 25th percentile on Universal Screeners may qualify for Response to Intervention (RTI) small group instruction, aiming to bridge the gap between their current performance level and grade-level work. An intervention plan is created, and the student's progress is monitored throughout the implementation. Parents are notified and informed of their student's progress if they receive MTSS support.

English Language Services

For students whose primary language is not English, the WIDA-Access Placement Test (W-APT) is administered to assess language proficiency. The WIDA results guide teachers in providing appropriate language support within the classroom. English Learners identified through MNPS receive EL services during the regular school day from an ESL-endorsed teacher at LEAD Southeast Elementary. Students proficient in English through the WIDA do not receive EL services.

Exceptional Education Services

Families suspecting their child has a disability can initiate the intervention process by requesting it in writing. This process reviews concerns and creates a plan for the next steps. Additionally, families can request in writing that the school assess their child for suspected disabilities. If a student qualifies for exceptional education services, an Individualized Education Plan (IEP) will be developed, and appropriate services will be provided.

Additional School Day Components

Related Arts

To promote the holistic development of every student, LEAD Southeast Elementary offers Related Arts classes. The Related Arts rotation includes Physical Education, Music, and Art.

Recess

Every student in grades K-5 will have the opportunity to attend a 20 - 25-minute recess. Please send students with weather appropriate clothing to wear when they play outside. LEAD Southeast Elementary reserves the right to prohibit students from recess due to extreme behavioral or safety concerns.

Outdoor activities will be altered to stay inside if the heat index is above 104°. If the heat index is stated between 95-104°, extra water breaks will be provided to account for the heat. If the windchill is under 13°, students will stay inside.

Extra-Curricular Activities

LEAD Southeast Elementary offers after-school clubs and activities for K-5 students. As extra-curricular opportunities become available, families will receive information to sign their students up to participate.

Students must be picked up on time from after-school clubs and activities. Students not picked up on time more than once will lose participation privileges. LEAD Southeast Elementary reserves the right to remove students from extracurricular activities based on student behavior, academics, or attendance.

Attendance

Attendance is integral to learning success, and all students are expected to be on time and present for the entire school day. Absences, tardies, or early dismissals disrupt valuable learning time. We urge families to make every effort to prevent students from missing school. To ensure students perform on grade level when transitioning to middle school, daily on-time attendance is essential. Absenteeism may impact a student's final grade in any class and can affect services provided for those with Individualized Education Programs (IEPs).

School Hours

Doors open at 7:45 a.m. Monday-Friday and students will be considered tardy at 8:10 a.m. Unless you have made prior arrangements with school staff, students are not to be dropped off at school before 7:45 a.m. as supervision is not available. The instructional school day ends at 3:00 p.m. Monday-Friday.

Excused and Unexcused Absences

Students who miss school are required to submit a handwritten excuse note from a parent or a doctor's note within 3 days of their return. LEAD Southeast Elementary only allows 5 handwritten excuse notes per school year. These notes must include the student's name, date of absence, reason, parent signature, and phone number. If a student is absent for 3 consecutive days or more, a medical note is necessary to excuse the absence.

It is the joint responsibility of the parent and student to provide the school with an excuse note, and failing to do so will result in an unexcused absence. Because students sometimes lose notes or forget to turn them in, the parent/guardian should make sure the front office has received the written excuse note.

10 consecutive days of unexcused absences will result in a student being unenrolled from school. Any attempt to falsely represent a parent/guardian or their signature is a violation of the Code of Conduct and will result in disciplinary action. Additionally, if a student is absent, they are not allowed to participate in any after-school events on that day, including the after-school program, clubs, etc.

LEAD Southeast Elementary adheres to state guidelines regarding truancy (see Tennessee Compulsory Attendance Laws below). A student is considered truant if they have 5 or more unexcused absences. If a student is truant there will be an in-person meeting and an Attendance Improvement Plan will be created with the family.

Excused Absences-It is the student's responsibility to arrange for all make-up work following an excused absence. LEAD defines excused absences as those due to one or more of the following:

- Illness
- Medical/Dental, including appointments
- School-sanctioned activities
- Absences related to the legal system
- Family Emergency
- Bereavement/Funeral
- Religious observances

Unexcused Absences -An absence that does not meet the criteria for an excused absence

Students who are absent from school and who fail to return to school with a note signed by a parent/guardian explaining the absence will be given an unexcused absence. Assignments given that day will result in a zero. This includes tests and quizzes.

Chronic Absenteeism: A student is considered chronically absent if he or she missed 10 percent or more of the instructional days they are enrolled. This includes all absences (excused, unexcused, or due to suspension). Research shows that students who miss more than 10 percent of school days are far less likely to graduate high school on time.

Tennessee Compulsory Attendance Laws

(Compulsory School Age is 6 Years to the 18th Birthday)

T.C.A. 49-6-3001 – School Age - (c) (1) Every parent, guardian or other legal custodian residing within this state having control or charge of any child or children between six (6) years of age and seventeen (17) years of age, both inclusive, shall cause the child or children to attend public or nonpublic school, and in event of failure to do so, shall be subject to the penalties provided in this part. (The courts have ruled that the word "inclusive" requires a child to attend school until the day before his/her eighteenth birthday.)

T.C.A. 49-6-3007 – Attendance & Truancy Reports - (e)

(1) By the beginning of each school year, the principal or head of school of a public, nonpublic, or church-related school shall give written notice to the parent, guardian, or person having control of a student subject to compulsory attendance that the parent, guardian, or other person having control of the student must monitor the student's school attendance and require the student to attend school. The written notice must inform the parent, guardian, or other person having control of a student that a student who accumulates five (5) days of unexcused absences during the school year is subject to the LEA's progressive truancy interventions and that continued unexcused absences may result in a referral to juvenile court. The five (5) days of unexcused absences need not be five (5) consecutive days of unexcused absences.

(2) The principal of a public school must report promptly to the director of schools, or to the attendance supervisor, the names of all students who have withdrawn from school or who have accumulated three (3) days of unexcused absences. Upon a student's accumulation of three (3) days of unexcused absences, the director of schools or the attendance supervisor may serve, or cause to be served, upon the parent, guardian, or other person having control of a child subject to compulsory attendance who is unlawfully absent from school, written notice that the child's attendance at school is required by law.

(3) Additionally, the principal of a public school must report promptly to the director of schools, or to the attendance supervisor, the names of all students who have withdrawn from school or who have accumulated five (5) days of unexcused absences. Each successive accumulation of five (5) days of unexcused absences by a student must also be reported.

(4)

(A) When a student accumulates five (5) days of unexcused absences, the director of schools or attendance supervisor shall serve, or cause to be served, upon the parent, guardian, or other person having control of a child subject to compulsory attendance who is unlawfully absent from school written notice that the child's attendance at school is required by law. The director of schools or attendance supervisor shall send a new notice after each successive accumulation of five (5) unexcused absences.

(B) After the child has accumulated five (5) unexcused absences, and after given adequate time, as determined by director of schools or attendance supervisor, the child's parent, guardian, or other person having control of the child has failed to turn in documentation to excuse those absences, the director of schools or attendance supervisor shall implement the truancy intervention requirements of the second tier of the progressive truancy plan as described in § 49-6-3009.

(C) This section does not prohibit a local board of education from adopting a progressive truancy plan that allows the LEA to take intervention actions before those required in this subsection (e). Such actions may include any of the truancy intervention actions required for the second or third tier of the LEA's progressive truancy plan.

T.C.A. 49-6-3009 – Penalty for Violations - (a) Any parent, guardian, or other person who has control of a child, and who violates this part commits educational neglect, which is a Class C misdemeanor.

(b) Each day's unlawful absence constitutes a separate offense.

T.C.A. 40-35-111 – Terms of Imprisonment or Fines - (e) (3) (3) Class C misdemeanor, not greater than thirty (30) days or a fine not to exceed fifty dollars (\$50.00), or both, unless otherwise provided by statute.

Early Dismissals

Early dismissals must be arranged prior to departure. A parent, guardian, or pre-approved representative (18 years of age or older) must report to the Main Office to sign the student out prior to being dismissed. All visitors must have a photo ID to be permitted to sign a student out.

- Siblings, persons unrelated to the student, or persons under the age of eighteen (18) will not be permitted to sign out LEAD Southeast Elementary students.
- ONLY pre-approved adult representatives will be permitted to sign out a LEAD Southeast Elementary student after showing a photo ID.

If a child attends less than one half of a school day, the student will be marked as absent. A written excuse note, or doctor's note should be turned in to the front office for this to be considered an excused absence.

You will NOT be able to do the following past 2:30 p.m. each day:

- Call and request the office to communicate a message to your student
- Bring an item to the office for us to deliver to your student
- Early pick up after 2:45 p.m. is not allowed.

Visitor Policy

In an effort to keep our students and staff members safe, all visitors to our building must submit their state issued identification. The identification will run through our Raptor system, and if cleared, will create a name badge that must be worn in the building.

Make-Up Missed Work

LEAD Southeast Elementary follows MNPS's guidelines for make-up work. Make-up work must be requested by the student or parent no later than three days after returning to school or he or she may forfeit the opportunity to complete the work. The work must be turned in by a mutually agreed upon time frame between the teacher and student.

Emergency & Inclement Weather Days

In the event of particularly dangerous weather conditions, LEAD Southeast Elementary will either cancel or delay the opening of school. Such announcements will be made on local news channels as well as an "all call". Please note that we will follow Metro Nashville's lead on cancellation or delays. On such days, please do not call the school as all information on school cancellations or delays will be reported via the television and radio by Metropolitan Nashville Public Schools (MNPS).

Aftercare

After Care program is a service we provide for parents for an additional fee. The After Care program begins immediately after school and ends promptly at 6:00 p.m.. Students are provided a snack and a drink. The After Care Program will allow time for students to work on their homework and read a book. Students will also have time for recess, games, and a variety of structured activities. Please see our website for payment procedures and policies. Students may not be picked up from After Care until regular car line dismissal is complete.

Transportation

Student safety is our first priority. Only individuals listed on the Emergency Contact Card will be allowed to pick-up students from school. Parents must maintain and update information whenever changes occur. Valid photo identification will be required of all individuals picking-up students. If someone arrives at the school to seek the release of a student, and the person's name is not on the Emergency Contact Card, or the person does not have valid photo identification, the student will not be released.

Parents or guardians should submit to school authorities a copy of any legal documents, which indicate who has legal access to the child and his/her records during school hours. In the absence of legal documentation, school officials will provide access only to parents and those individuals whose names appear on the Emergency Contact Card. Failure to provide the school legal documentation outlining visitation rights will result in parent(s) listed on the Birth Certificate to be permitted to pick up a child. Friends and strangers will be denied access to a student in the absence of verified parental consent.

Transportation Change Policy

Parents/guardians should make all arrangements for transportation before the child leaves for school. Transportation arrangements can be changed during the day by sending a written note with the student in the morning. Contact the front office for additional assistance. Phone calls or text messages sent directly to your student's teachers are not official transportation changes.

Car Rider Policy

Arrival

Do not arrive before the designated time. Turn cellphones off before arriving in the drop-off zone. Once in the drop-off zone, place the car in park. No students should be released from their car until a staff member has officially started the car arrival procedure. Car rider arrival will run from 7:30-7:45 a.m. each day. For the safety of all students during this time, all cars are required to remain parked until officially dismissed by a staff member. After 7:45 a.m., the doors will be closed at the drop-off area. Tardy students will need to be signed in at the front office.

Dismissal

Car rider dismissal will begin at 3:30 p.m. Monday-Friday. Turn cellphones off before arriving in the pick-up zone. Once in the pick-up zone, place the car in park. All cars in the pick-up zone will be loaded and then dismissed as a group once all students are cleared. Please adhere to staff direction and traffic

patterns. While in the loading zone, parents should pull all the way up and park until all students are safely out of the unloading zone. Staff will dismiss cars in the unloading zone allowing more parents to pull up, park and unload. **For the safety of all students and staff, adults must remain in their cars instead of coming to the doors where students are released.**

- **Dismissal Pick-up Placard:** The pick-up placard must be displayed in your driver or passenger side front window. A staff member will call for your student to come out for pick-up after they have read the pick-up placard. Proceed around the parking lot to pick up your child. Once you arrive in the pick-up zone, your car should be placed in park. All cars in the pick-up zone will be loaded and then dismissed as a group. Students will be escorted down the rows by staff members and put into the passenger side back seat. Once this group is dismissed, the next group will proceed to the pick-up zone, place their car in park, load students, and wait to be dismissed as a group. This procedure will continue until campus is clear. Do not leave your car unattended in the car loop lane during pick up and dismissal.

Bus Transportation Policy

LEAD Southeast Elementary provides busing that is contracted through an outside bus company. Parents who wish for their child to ride must register through the vendor's onboarding process. Students who ride the bus are picked up from an assigned location (drop off/pick up point) and then returned to that same location. Any student who misses the bus must still attend school; they must be brought to school by car. Students who miss the bus to go home will have to be picked up by an approved person as well.

Students and parents must remember that the same school behavior policies and expectations apply to the bus environment as well. Students are expected to:

- Follow all driver rules and directions
- Maintain the correct voice level
- Always stay seated, and follow assigned seating if necessary
- Abstain from eating or drinking
- Cell phones and all other telecommunication devices must be turned off
- Follow the LEAD Southeast Elementary model of being respectful, responsible, and safe in all environments including the bus itself as well as any drop-off or pick-up location

Students who exhibit unapproved behaviors, cause disruptions, or interfere with the legal, orderly, or safe operation of the bus will be referred to School Administration for disciplinary action which can include but is not limited to detention (lunch/after school), detention, suspension, loss of bus privilege, or recommendation for expulsion. Students may only ride the bus in which they are assigned.

School Culture and Discipline

Dress Code

LEAD Southeast Elementary requires all students to wear a common school uniform to unite us as a community and ensure students are prepared for class without wardrobe distractions. Please follow the below Standard School Attire requirements:

- **Top:** Solid colored polo is required. Students may also wear LEAD Southeast Elementary (with logo) crewneck sweatshirts, jackets, or cardigan sweaters over their uniform shirt. No jackets or sweatshirts with hoods are allowed in the classroom. Students may also wear a solid long sleeve shirt under their polo.
- **Bottom:** Tan or black khaki pants- pants must be professional “khaki/docker” material, pants, shorts, skirts/skort, or jumpers. A belt is not required as long as pants are able to stay up around the waist. Students may wear tan or black khaki shorts and skirts as long as they extend past the student’s fingertips when their hands are at their sides.
 - No athletic joggers, jeans, pants in sweatpants material, exercise/warm-up pants, pajama pants or jeggings. Leggings, or yoga pants can only be worn under a skirt or skort.
- **Shoes:** Shoes must close toe and full coverage. They should be school appropriate and appropriate for P.E. and recess.
 - Students can wear any color shoe. Students may wear sneakers, boots, flats, or crocs in sport mode. Students may not wear clogs, sliders, or sandals.
- **Outerwear:** Students are always encouraged to wear a winter coat or jacket to school on cold days. Students will be asked to store coats in lockers upon entering their classroom.
 - Students may not wear blankets throughout the school day.
 - Outerwear can be any color or style, as long as any design is appropriate for a school setting (no logos representing alcohol, drugs, hate speech, adult-themes, etc.).
- **Jewelry:** No specific jewelry expectation (except during active play and PE; the teacher can request the child remove jewelry during active play/PE).
- **Hats/Headwear:** No hats/headwear in the building unless it is for religious purposes or related to the function of hair (scarfs, etc.). No bandanas, bonnets or do-rags are permitted.
- **Kindergarten:** Parents of students in Kindergarten are required to leave a Ziplock bag labeled with the child’s name with a spare change of clothes in the classroom throughout the year for emergencies.

Friday Jeans Days

Jeans may be any color but must be school appropriate. Jeans may not have rips that expose legs above the knee and may not be leggings.

Free Dress Days

Students who qualify for free dress will be informed. Additionally, there are times when all students are allowed to come to school in free dress or in silly-themed clothing as part of school celebrations. These instances will always be communicated to students and families in advance.

Cell Phones

Many families want to have a way to communicate with their child before or after school. However, cell phones are distracting during the day. Students may NEVER use their cell phone during the school day.

If a family is trying to reach their child, they must call the main office and the student will be pulled from class. Please do not call or text your student during the day. If a student’s phone is in use during school hours, the phone may be confiscated and locked in our main office until a guardian comes to retrieve it.

Student cell phone expectations:

- Turn cell phones off before entering school.
- Once inside the school building, ask permission to turn the phone off if you haven't already.
- Students are responsible for keeping their phones safe. School is not responsible for any lost or missing phones.
- Cell phones must be in backpacks, NOT in pockets. Cell phones in pockets will be taken if a student refuses to put it in his or her bag.
- Cell phones must stay off and be in bags from arrival through dismissal.
- Students may never play music or stream video out loud from their phone while on school property.
- Students may never use cell phones to record other students while on school property, including the school bus and city bus stops.
- If a student's cell phone rings, he or she will be issued a reminder and will be told to shut the phone off and keep it stored away. If the student responds with disrespect and refuses to turn off the phone or put it away, the phone will be confiscated.
- Anytime a cell phone is confiscated, it will be locked in the main office and a guardian must come pick it up at a time that is convenient for them.

Food/Snacks

We want to provide a healthy environment for our students. Students should avoid bringing candy, soda, or energy drinks. Students are not to bring large bags of chips to school. Any chips brought to school for lunch should be for individual consumption.

Students are not allowed to eat in class. Students can and should bring a water bottle to school. All bottles brought to school must be plastic, no glass bottles are allowed.

Surveys

We survey our students to get their perspective of our school culture, classroom culture, and to assess individual student needs.

Student Surveys

The student survey is taken once in the fall and again in the spring. The survey is adapted to be administered to nonreaders. Every student takes part one, pertaining to school culture. Some families may elect to opt out of part two, which surveys student needs. The data from the LEAD Southeast Elementary Student Survey is confidential, but anonymous trends and conclusions are shared with the staff. This data informs interventions run by the Student Support Team.

Class Surveys

Each teacher will administer an anonymous survey to their classes once each quarter. This survey is standard across the school and is an opportunity for students to provide input on the culture of their class.

School-wide Positive Behavioral Interventions & Supports

At LEAD Southeast Elementary, we aspire to create a positive and joyful learning environment. We achieve this through frequent, actionable feedback that reinforces positive choices and addresses behaviors not in line with our expectations and Ethos. During the initial weeks of school, we will guide students in understanding

our behavioral expectations, teaching them our systems, and instructing them on how to appropriately respond to feedback. Positive behaviors are celebrated through classroom reinforcement, school-wide praise, and various incentives.

Expectations & Rules

LEAD Southeast Elementary Behavior Matrix			
	BE SAFE	BE RESPECTFUL	BE RESPONSIBLE
CAFETERIA	• Hold tray with 2 hands • Keep food to self without sharing • Use walking feet	• Voice level 1 • Use a napkin to clean self and spills • Follow adult directions • Use kind words and actions	• Get all utensils before sitting down • Empty tray carefully into the trash can
RECESS	• Use equipment appropriately • Keep hands and feet to self	• Practice good sportsmanship • Take turns and share equipment	• Line up when the bell rings • Put equipment away
HALLWAY	• Stay with line • Walking feet • Keeps hands and feet to self	• Voice level 0 • Keep hands by sides and not all the walls •	• Go directly to where you need to go • Look to your teacher for directions
ARRIVAL/ DEPARTURE	• Report directly to assigned area • Keep hand, feet, and objects to self • Use walking feet	• Voice level 1 • Follow directions of Safety Patrol members • Wait with a calm body and quiet voice in line	• Be on time • Go directly to class • Turn off all electronics
RESTROOM	• Use soap and water for washing hands • Keep restrooms clean and dry	• Voice level 0-1 • Honor privacy • Wait patiently for your turn	• Flush toilet after use • Use quickly, then leave • Report problems to an adult
BUS	• Stay in seat • Keep hands, feet, and objects to self	• Voice level 1 • Follow bus driver directions	• Get to bus on time • Walk on and off quickly
ASSEMBLIES/ SPECIAL EVENTS	• Sit correctly on floor (crisscross applesauce) • Keep hands and feet to self	• Voice level 0 • Follow teacher and staff directions	• Eyes on the speaker
CLASSROOM	Every classroom will establish a set of rules aligned with our school expectations (Be Safe, Be Respectful, Be Responsible). These rules will be crafted collectively, fostering a sense of community, and ensuring that each student is actively involved and invested in the process. This collaborative approach aims to cultivate a shared understanding and commitment to the guidelines that govern our classroom environments.		

LEAD Southeast Elementary Progress Report

DeansList

DeansList serves as the system used to monitor student behavior. All K-5 teachers utilize this program in a developmentally appropriate manner to acknowledge and incentivize students, foster growth, and engage with families. Families have online access to DeansList data and will receive a weekly behavior report on Fridays. Students can earn merits by demonstrating LEAD's Ethos. See below for a comprehensive list of merits.

Merits

Students can earn positive points on their progress reports ranging from +1 to +3 by demonstrating school expectations, excellent academic behavior, and SEL skills. Students can earn +5 points on their progress reports by demonstrating the Ethos: commitment, discipline, self-reliance, courage, service to others.

- **Top Merit Earners:** We believe it is important to recognize our students who go above and beyond for their education and for their school community. Students are issued merits throughout the week for meeting school expectations and demonstrating our Ethos. Each Friday the top two point earners in each grade level will be announced and celebrated.
 - **Weekly Free Dress:** The top two point earners in each grade will be given a free dress pass to use the following week. If there are more than 2 students who qualify because their points are tied, all students who qualify will be granted free dress. Any repeat winners within a quarter will get free dress but will not occupy one of those top two spots, so the next highest will also get free dress.

Type of Merit	Examples
Bounce Back (+1)	• After being given a redirect, getting back on-task • Using the Calm Down corner to cool down and rejoin the class
Be Safe (+1)	• Taking the lead to clean up the classroom • Using walking feet in the hallway
Be Respectful (+1)	• Greeting teachers and classmates • Bringing joy to classroom
Be Responsible (+1)	• Having all materials ready to go • Eyes on the speaker
Excellent Academic Behavior (+3)	• Asking questions and showing an interest in learning • Collaborating with partner or group
Commitment (+5)	• Consistently participating in class discussions • Continuing to work on a skill that is challenging
Discipline (+5)	• Consistently following school rules when no one is watching • Staying calm during challenging tasks

Self-Reliance (+5)	• Trying to solve a problem independently before seeking help • Keeping materials organized without reminders
Courage (+5)	• Speaking in front of the class when nervous • Standing up against inappropriate behavior
Service to Others (+5)	• Helping a classmate tie their shoe • Including others while on the playground

Crew

Crew is a community gathering time intended to create joyous and formative experiences, foster connectedness, and build social-emotional skills. Each morning students participate in lessons developed by the school counselors that focus on personal and social development. At LEAD Southeast Elementary, Crew communities are named after mountains. The culture built during Crew gatherings is visible throughout the school day.

BeWell Program

BeWell in School is a science-backed mindfulness program empowering elementary students to regulate their emotional needs and create a positive and nurturing educational experience for all. Staff and students at LEAD Southeast Elementary will engage in movement, mindfulness, and breathing techniques to foster a sense of balance and well-being. By helping students develop strategies to regulate their emotions, the BeWell Program supports more time on task, fewer discipline referrals, and enhanced academic performance. Students have the option to request a visit to our designated BeWell Room, where they can receive 1:1 regulation support from our dedicated BeWell Support Coordinator. In making mindfulness concepts more inclusive, BeWell helps build connection and belonging for the entire school community.

Behavior Interventions and Supports

LEAD Southeast Elementary prioritizes keeping students in the classroom, while maintaining a safe space for all learners. Each student has different needs, and some students may require additional academic or behavioral support. When challenging behaviors occur in the classroom, our teachers will provide immediate corrections and feedback. In-class responses may include verbal prompts, redirection, student/teacher conferences, and positive praise.

Classroom Calm Down Corner

Each classroom has a dedicated space designed to provide students with an area for independent cooling down. This separate, purposeful space allows students the autonomy to choose the Calm Down Corner as a proactive method for de-escalation and refocusing, empowering them to make positive choices for their learning. Here, students can effectively apply the tools they've acquired through the BeWell program to regulate their emotions and enhance their overall well-being.

Multi-Tiered System of Support- Behavior (MTSS-B)

During MTSS-B meetings, dedicated discussions focus on addressing both internalizing and externalizing behaviors, ensuring a comprehensive approach to supporting the diverse behavioral needs of students. The MTSS-B team, consisting of the Assistant Principal of Students, Student Support Coordinators, counselors, mental health providers, Family & Community Engagement Coordinator, and Behavior Analyst develop an

intentional evidence-based intervention plan to support students behavioral health needs and track the behavior over time. Subsequent meetings will assess the effectiveness of interventions, adjusting or intensifying them as necessary. If the behavior intervention is unsuccessful after 4-6 weeks of data collection, a formal Support Team referral may be considered.

Counseling Program

Our school counseling program plays a crucial role in fostering the social and emotional development of students. This program is run by our certified school counselors who work collaboratively with educators and parents to create a supportive environment for students. Through individual and group counseling sessions, this program aims to address academic, personal, and behavioral challenges, ultimately contributing to the overall well-being and success of students during their formative years.

Mental Health Services

Lead Southeast Elementary partners with Centerstone to provide individual, group, or family therapy based on student need. Centerstone counseling services are conducted at school for students qualifying with TennCare insurance. Centerstone services can be requested by a family or staff member. All Centerstone therapy services require guardian permission and documentation from the counselor. Counselors may also refer to outside community agencies for services and support.

Discipline

In order to facilitate a strong culture across our network of schools and to set consistent expectations for families who choose to enroll their students in multiple schools across the district, we have chosen to follow the MNPS Discipline Tables across our network.

Restorative Practices

Restorative practices in schools prioritize relationship-building and accountability over punitive measures. They involve open communication, empathy, and dialogue to address conflicts and misconduct. By focusing on repairing harm and promoting understanding, these practices contribute to a more harmonious and cooperative school community, fostering a conducive atmosphere for learning and personal growth. In alignment with our Lead Ethos, our mission is to instill resilience in our students when mistakes occur. Recognizing that perfection is not expected from our young learners, we commit to employing Restorative Practices to guide our response in addressing conflicts or harm.

Office Referral

An office referral serves as a consequence for behaviors that are highly disruptive, disrespectful, or egregious, posing a threat to the safety or environment of the classroom. It is also issued for repeated off-task behavior that interferes with the learning of others. Those who earn an office referral will need to exit the learning environment and seek assistance from the Student Support Coordinator or Assistant Principal of Students to de-escalate and address the incident. Collaboratively, the Student Support Coordinator and the student will develop a restorative plan for a positive return to the classroom. Parents will be informed about the student's referral, the incident, and the ensuing consequences. All office referrals will be tracked via DeansList.

Student Discipline Hearing Procedures

A. SUSPENSION PROCEDURES

“Suspension” is defined as dismissal from attendance at school for any reason not exceeding ten (10) consecutive days. Multiple suspensions shall not run consecutively nor shall multiple suspensions be applied to avoid expulsion from school.

1. Suspension of Ten Days or Less

1.1 During the investigative process, a student will be afforded due process (the opportunity to give his/her written and verbal account of the incident). After the investigation, if a suspension is warranted, a suspension notice will be issued. A summary suspension of no more than two days may be given while completing an investigation.

1.2 If a student’s presence in the school poses any real or potential danger to other students or school officials, or a continual interruption of student education, the student will be removed from the school immediately. In this case, parent notification and due process will follow as soon as possible.

1.3 If appropriate, incidents may be referred to local law enforcement officials.

1.4 All information pertaining to the behavior incident should be entered in Power School including the date of the incident, primary student, witness and/or victims, appropriate event/discipline codes, incident details, action start and end dates, responsible person (principal or designee assigning action), and action details. The action of Out of School Suspension should be entered. Do not enter the action of Suspended.

1.5 Upon suspension of any student other than for in-school suspension of one (1) day or less, the principal shall, within twenty-four (24) hours, notify the parent or guardian. Principal or principal designee should verify with parent/guardian the student mailing address. The Notice of Disciplinary Action Report should be mailed the same day as the incident is addressed. A copy of this report should be placed in the student’s discipline file, which is separate from the cumulative record [TCA 49-6-4106 Disciplinary Referrals, Acts 2009, ch. 315, § 1.] Principal shall within twenty-four (24) hours notify the head of schools or the head of schools’ designee of the above suspension.

1.6 If the suspension is for more than five (5) days, the principal shall develop and implement a plan for improving the behavior.

1.7 In the event the suspension occurs during the last ten (10) days of any term or semester, the pupil may be permitted to take final examinations or submit required work that is necessary to complete the course of instruction for that semester, subject to the action of the principal, or the final action of the board of education upon any appeal from an order of a principal continuing a suspension. [TCA 49-6-3401 (d)]

2. Expulsions/Remandments

For Disciplinary Purposes: “Expelled” means removal from the student’s regular school program at the location where the violation occurred or removal from school attendance altogether, as determined by the school official. [TCA49-6-3401 (g)(5)(A)] “Expulsion” is defined as removal from attendance at school for more than ten (10) consecutive days or more than fifteen (15) days in a month of school attendance. Multiple suspensions that occur consecutively shall constitute expulsions. The school district shall not be eligible to receive funding for an expelled student. [TCA 49-6-3007 (h) (1)].

“Remand” is defined as assignment to alternative school. The student so assigned shall be included in ADA/ADM and will continue to be counted as present for funding purposes. The state department of education shall establish a set of codes to be used for reporting reasons for students on remand to an alternative school. [TCA 49-6-3007 (h) (2)].

2.1 All Notices of Expulsion shall be signed and approved by the Principal of the school.

2.2 School administrators will immediately notify the Director of Student Support of a student expulsion or remandment of more than ten days and the cause and conditions for readmission within 24 hours. If the student has an IEP, school administration will also immediately notify the Director of Exceptional Education. The following forms should be immediately faxed:

1. Discipline Response Form
2. Discipline Office Expulsion Referral Form
3. Notice of Expulsion of More than Ten (10) Days
4. Notice of Disciplinary Action
5. Notice of Expulsion and Right to Appeal
6. Exceptional Education Checklist

2.3 No later than the third (3rd) day of expulsion/remandment, the additional items below should be faxed to the Head of Schools:

1. Principal's, Student's, and all Witness Statement
2. Student's Report Card
3. Student's Transcript
4. Student's Schedule
5. Current IEP for Exceptional Ed Students
6. Manifestation Determination papers for Exceptional Ed Students

2.4 All information pertaining to the behavior incident should be entered in Power School including the date of the incident, primary student, witness and/or victims, appropriate event/discipline codes, incident details, action start and end dates, responsible person (principal or designee assigning action), and action details. Schools should activate the expulsion indicator in Power School and remove student schedules. The Incident should be recorded with the action of expelled for high school, until the time a student enrolls in an Alternative Learning Center (ALC). Once a student has enrolled in the ALC, the expelled action should be deleted from the incident and the action of remandment should be added to the incident. Expelled students should not be withdrawn as dropouts from the home school.

2.5 Upon expulsion or remandment of any student the principal shall, within twenty-four (24) hours, notify the parent or guardian via written or actual notice. Principal or principal designee should verify with parent/guardian the student mailing address. The Notice of Disciplinary Action Report should be mailed the same day as the incident is reported and action is determined. Notice may be hand delivered. The right to appeal should be included with this notice. A copy of this report should be placed in the student's discipline file, which is separate from the cumulative record [TCA 49-6-4106 Disciplinary Referrals, Acts 2009, ch. 315, § 1.]

Family Involvement

Visitor Policy

We love when families visit and welcome guests in our classrooms. If you are interested in observing your student in class, you must reach out to the teacher of the class and let him/her know you'd like to sit in. When you come into the school for an observation, you will sign in at the main office and review the Parent Observation Guidelines with a staff member. It is important to us to allow families to see what learning looks like at LEAD Southeast Elementary, but we are also aware of how some visits can be distracting or even embarrassing for students in class. Because learning is our top priority, we have created the following guidelines for parent observations:

LEAD Southeast Elementary Parent Observation Guidelines

Thank you for coming in to see your child's classroom! We are excited to have you and appreciate our partnership in providing an excellent education to your child.

Below are some guidelines we have put in place to preserve the classroom environment during your time here:

1. Introduce yourself to the teacher.
2. Don't distract or interact with other students or your own child during class unless the teacher asks you to participate.
3. Please refrain from using your phone/technology while in the classroom. We want to make sure the students are not easily distracted by having a guest using technology.
4. Write down any questions or comments you have. You can use the space on the back for this.
5. If you are not staying until a transition time, leave your phone number with the teacher so he/she can follow up with you after.

Reglas para Visitas de Padres a las aulas de su Estudiante en LEAD Southeast Elementary

¡Gracias por venir a ver el aula de su estudiante! Estamos muy contentos de recibirle y apreciamos su colaboración en la provisión de una excelente educación para su estudiante.

Debajo hay algunas reglas que hemos puesto en efecto para preservar el ambiente del aula durante su visita:

1. Preséntese con el maestro.
2. No distraiga o interactúe con los estudiantes (incluyendo el suyo) durante la clase a menos que el maestro le pida su participación.
3. Por favor absténgase de usar el teléfono u otro artefacto electrónico mientras esté en el salón de clase. Queremos asegurarnos que los estudiantes no se distraigan porque nuestro invitado esté usando tecnología.
4. Escriba cualquier pregunta o comentario que tenga. Puede usar el espacio provisto detrás.
5. Si usted no se piensa quedar hasta el cambio de clases, déjele su número de teléfono al maestro para que pueda darle seguimiento después.

قواعد زيارات الآباء إلى فصل الطلاب الخاصة بك

أشكركم على حضوركم في الفصول الدراسية لرؤية طفلك! نحن سعداء جداً باستقبال ونقدر تعاونك في توفير تعليم ممتاز لطلابك.

فيما يلي بعض الإرشادات التي وضعناها للحفاظ على بيئة الفصل الدراسي زيارتك:

١. قدم نفسك للمعلم.
٢. لا تشتت انتباه أو تتفاعل مع الطلاب الآخرين أو طفلك خلال الفصل الدراسي إلا إذا طلب منك المعلم مشاركتك.
٣. يرجى الامتناع عن استخدام الهاتف أو أي جهاز إلكتروني آخر أثناء وجوده في الفصل الدراسي. نريد أن نتأكد من أن الطلاب لا يشتت انتباههم لأن ضيفنا يستخدم التكنولوجيا.
٤. اكتب أي أسئلة أو تعليقات لديك. يمكنك استخدام المساحة في الخلف.
٥. إذا كنت لا تخطط للبقاء حتى تغيير الفصول ، اترك رقم هاتفك للمعلم حتى تتمكن من المتابعة لاحقاً.

Eating Lunch with Students

Families are welcome to eat lunch with students. If you are bringing in outside food, it may only be shared with your child and no other students in the class.

Classroom Celebration Policy

Families who would like to celebrate their student's birthday or other celebration are welcome to come in at their assigned lunch time with a meal or other treat for only their student. If you would like to bring in food for the class, it must first be approved by the classroom teacher. Store bought food may be brought in but there must be enough for each student in the class. Balloons are not prohibited.

Family Communication

It is the policy of LEAD Public Schools that timely communication between school personnel and families is crucial to the success of our schools, as is the work/life balance of our employees. Therefore, teachers are expected to communicate with families to track progress, behavior, and other school-related topics.

Communication between staff and families will occur only between 7:00 a.m.-7:00 p.m. Monday-Friday. Any communication to a teacher after 7 p.m. will be answered the following school day. Teachers are not expected to communicate with students and parents during the weekend. In case of an emergency with students and families communicated after 7 p.m. or on weekends, teachers will immediately contact their Principal, Assistant Principal, and/or Head of Schools.

In addition to calling the school, families are encouraged to email teachers directly with any questions or concerns. All staff emails are the teacher's firstname.lastname@leadpublicschools.org. Every LEAD Southeast Elementary student is issued a LEAD email that they can use to contact teachers for homework help at night until 7 p.m..

To model the professionalism essential for college and career readiness, both staff and families will abide by the following communication norms that prioritize respect:

- Respond to letters or phone calls within 24 hours
- Schedule and/or attend meetings when requested

- Avoid the use of offensive language in all spoken and written communication
- Keep conversations about LEAD staff and families positive when in the presence of students

Red Take Home Folder

Everyday, LEAD Southeast Elementary sends home a red folder with each student. Your child will get a variety of documents that they are instructed to put in their red folder to bring home. Students are responsible for keeping track of their red folders. The folder will contain:

- **LEAD Southeast Elementary Progress Report:** It is communicated to students that we expect a parent/guardian to review this report and sign it for your student to turn into their teacher the following morning. This report includes weekly attendance, homework completion, merits earned, and behavior concerns.
- **Academic progress reports or report cards:** Academic reports come home in red folders twice a quarter- one is a progress report, and one is a report card. Parents are expected to read the progress reports and contact the school with questions or concerns. These must be signed and shown to your child's teacher.
- **Important school information:** Any paper communication from the school will come to you via the red folder. This includes notices of academic concern, immunization reminders, home language survey, field trip permission slips, continuation forms, and MANY other important documents.
- **Homework:** Homework will be sent home Monday-Thursday and should be returned back to school based on teacher guidelines.

Parent Conferences and Parent Nights

We will have scheduled parent conferences and parent nights throughout the year. We encourage families to set up conferences when you would like to discuss your child's progress. Additionally, teachers or administrators may contact you to set up conferences. Information on parent nights will be shared throughout the year. Look for specific information in your student's Red Folder or our social media pages.

School Conduct Policies

In reference to behavioral offenses and corresponding consequences, LEAD Southeast Elementary adheres to the policies outlined in the Metro Nashville Public Schools and LEAD Public Schools Student and Family Handbooks.

Other School Policies

Personal Belongings

Toys, games, trading cards (of any kind), music players, game players, headphones, and other like items, should not be brought to school unless requested by a teacher IN WRITING for special purposes. If an item of this nature is brought without the teacher's permission, the item will be held at school until picked up by a parent.

Parents and students are advised that it is a violation of school code to use these personal items during school hours. Items in use during school hours will be confiscated and appropriate disciplinary action will be taken. Confiscated items will have to be picked up by the parent in the front office.

Lost and Found

LEAD Southeast Elementary assumes no responsibility for any loss of students' personal property. Items that have been found should be returned to the Office Manager. Students who have lost an item at school may come to the Office before or after school to check for lost items.. All items not picked up at the end of each month will be donated.

Use of Tobacco

LEAD Southeast Elementary promotes and maintains a smoke-free environment. All employees, scholars, parents, guests and vendors are prohibited from smoking or using tobacco products. Students may not have tobacco in their possession at any time during the school day, at any school-sponsored activities or on any school grounds. Students in violation of the tobacco/smoking regulation will be subject to disciplinary action including expulsion.

Property

All students are expected to respect and care for all property of LEAD Southeast Elementary including building facilities, desks, dry erase boards, dry erase markers, books, lavatories, lockers, belongings of students/staff, etc. Sharpies are prohibited items that damage property and will be taken if a student is found in possession. Any student damaging or defacing property may be required to pay for the damage or loss, including professional labor costs. Willful destruction or defacement of property at any time is just cause for disciplinary action and may result in expulsion.

Theft

Committing an act of theft may result in suspension and other disciplinary actions. The student will also be required to pay for or replace the item(s) stolen. Proper outside authorities may be contacted. Any student involved in theft will be denied participation in school activities for a certain period of time to be determined by proper school authorities.

Search and Seizure

School authorities may seize any contraband, substance, or object, the possession of which is illegal or any material or object that violates a school rule or poses a hazard to the safety and good order of the school. Students are not to bring these items to school or to any school-sponsored function.

1. *Authority to Conduct a Search* - The law allows school authorities to search students, their lockers, their motor vehicles and personal property when they have reasonable suspicion that a particular student is in possession of something prohibited by school rules or by law.
2. *General Inspection* - School authorities reserve the right to make general inspections for purposes including but not limited to safety, cleanliness, retrieval of school material, and maintenance. Such general inspections shall not include searching personal items stored in clothing, bags or purses, unless reasonable and specific suspicion exists.
3. *Desk/Storage Area Inspections* - All storage areas provided for student use on school premises remain the property of the school and are subject to inspection, access for maintenance, and search.

4. *Personal Searches* – A student’s person and/or personal effects (e.g., purse, backpack, etc.) may be searched when school authorities have reasonable suspicion to believe that the student is in possession of illegal or unauthorized items.

Any student who refuses to submit to a reasonable search by school authorities will be subject to disciplinary action. School authorities may detain the scholar pending the notification and arrival of the student’s parent/guardian and/or law officials as appropriate.

LEAD Public School’s Family Bus Expectations and Code of Conduct

LEAD Public Schools will provide busing for your student to and from school within the “school zone” limits of Nashville and is more than 1.25 miles from school. If a student is less than 1.25 miles away from school, they are designated as a walker or can be dropped off at school by a legal guardian. This is a service we provide to assist our families. However, busing is considered a privilege and if policies and behaviors are not adhered to, bus privileges can be revoked. In order for the school to maintain safe and efficient bus service, all families who choose to use our buses must agree to the code of conduct and policies. Students, who are bus riders, must be at their bus stop 10 minutes prior to the assigned time and prepared to wait 10 minutes after if needed due to traffic patterns.

Resources & Tools for Families

Resource	How to access	Details
Facebook	Search Facebook for “The LEAD Southeast Elementary Family” or go to this URL	• Updates about school events and calendar • Student Celebrations • Community events • Inclement weather updates
Instagram	@lead.southeastelem	• Updates about school events and calendar • Student Celebrations • Community events
DeansList	You will be given a username and password at Family Orientation Night. You can access Dean’s List by: •	• Access your students merits • See notes from teachers • Receive text messages from school staff regarding any announcements
School Counseling Website	Insert URL	• Community resources in English and Spanish
School Website	Insert URL	• School calendar • Family Resources • Links

Infinite Campus	You will be given a username and password at Family Orientation Night. You can access Infinite Campus by: - Go to familyportal.mnps.org - Click 'Campus Parent' - Enter the given username and password	- Student grades - Student schedule - Student attendance
Teachers (Direct Contact)	Teachers provide all families with their contact information at the beginning of the school year and/or when a new student enrolls. All teachers have an email address that is firstname.lastname@leadpublicschools.org Example: briana.shelton@leadpublicschools.org Families are always welcome to call the front office and request a direct contact for teachers. The front office phone number is XXXXXXXXXX	
Administrator Contacts	Principal: Email: xxx@leadpublicschools.org - Phone: Assistant Principal of Instruction: - Email: xxx@leadpublicschools.org - Phone: Dean of Culture: - Email: xxx@leadpublicschools.org - Phone:	

PARENT/STUDENT SIGNATURE PAGE

LEAD Southeast Elementary

20XX-20XX

Dear Students and Parent(s)/Guardian(s):

This handbook was developed as a guide for students and parents and to answer commonly asked questions that come up during the course of a school year. Our goal is to create a positive educational atmosphere of learning where rules are enforced firmly, fairly, and consistently to all students. We ask that you familiarize yourself with this handbook by reading it and ask that you sign this page as evidence that you are aware of our policies and procedures. This form is part of the student registration process at LEAD Southeast Elementary and must be returned as a condition of enrollment.

Signing below is evidence that parents and students have or will read and understand the contents of this handbook. It also grants permission for school photographs or videotapes to be used in media presentations that are made available to other educational institutions or through a cable television station or network.

Parents understand that their child's image, name, work product, school, and grade may be revealed in the presentation(s) but that no other information about their child or his/her schoolwork will be revealed without prior consent.

Signature of Parent/Guardian

Date

Print Name of Student

Grade of Student

LEAD Public Schools Elementary Discipline Table

LEAD Public Schools uses the MNPS Discipline Table

Behavior	Code	Definition	Response	Elementary OSS (Grades K-5)
Type 1 Behaviors				
Tardy to School, Bus, or Class	100	Arriving late to school, bus, class, or activity.	A	No
Noncompliance With a Reasonable Request	102	Not following the reasonable request of a teacher, administrator, or staff member.	A	No
Agitating Other Students	103	Unwanted and/or unreciprocated picking on or bothering of other students.	A	No
Profane or Indecent Language	104	Using profane or indecent language, such as cursing. If directed at a teacher, staff member, or administrator, see Code 301.	A	No
Possession of Fireworks	106	Knowingly possessing fireworks. Fireworks will be confiscated and not returned.	A	No
Dress Code Violation	107	Wearing clothing that does not comply with the school's Standard School Attire policy or requirements for appropriate dress.	A	No
Type 2 Behaviors				
Repeated Violations of a Pattern of Same Type 1 Behaviors, With Evidence of Implemented Interventions	200	Repeated Violations of a Pattern of Same Type 1 Code behaviors, with evidence of implemented interventions. The student must engage in <u>3</u> or more documented incidents of the same Type I Code (minimum of 3 within one semester before Code 200 is used). There must be evidence of multiple implemented interventions to address the Type I behavior. Interventions must be documented in the referral and in Support and Intervention. Schools are to use RPA's Peace Centers, Advocacy Centers, (Tier 2 behavior plan, collaborative referral, behavior contract, restorative consequence, etc.) to address behavior concerns.	A,B,T	No
Possession of Tobacco Products	202	Possessing any tobacco products, including but not limited to, cigarettes, cigars, vapor or e-cigarettes, or chewing tobacco. All items will be confiscated and not returned. Students under 18 will be issued a citation.	A,B	No

E. Student Discipline Policy

Electronic Devices	203	Using a cell phone, electronic device, or the internet for non-educational purposes or without the permission of the classroom teacher or school administrator. A teacher may withhold a student's phone from the student for the duration of the instructional time if the student's phone is a distraction to the class or the student. -TCA Title 49, Chapter 2 and Title 49, Chapter 6.	A,B	No
Disruption of Classroom	204	Continuously and intentionally disrupting the classroom learning environment to the extent that the learning of other students or the routine functioning of the class is significantly impaired. The discipline referral must describe the significant impairment to the learning or routine functioning of the class.	A,B	No
Gambling	208	Betting on games or activities for money or things of value.	A,B	No
Drug Paraphernalia	210	Possessing any material used to produce or consume illegal drugs. Drug paraphernalia includes, but is not limited to, bongs, roach clips, miniature spoons, and pipes used to consume illegal drugs. All items will be confiscated and not returned.	A,B	No
Cutting Class	211	While on school property, failing to attend a scheduled class or activity without authorization. If a student is not attending any classes while in the building for the entire school day for five days, truancy protocol should be triggered.	A,B	No
Inappropriate Physical Contact With Other Students	212	Engaging in unwanted minor physical contact with another student such as pushing, bumping, or touching.	A,B,T	No
Type 3 Behaviors				
Repeated Violations of a Pattern of Same Type 2 Behaviors, with Evidence of Implemented Interventions	300	Repeated Violations of a pattern. The student must engage in <u>3</u> or more documented incidents of the same Type 2 Code (minimum of 3 within one semester before Code 300 is used). There must be evidence of multiple implemented interventions. Interventions must be documented in the referral and in Support and Intervention. Schools are to use RPAs Peace Centers, Advocacy Centers, (Tier 2 behavior plan, collaborative referral, behavior contract, restorative consequence, etc.) to address behavior concerns.	B,C,T	Yes
Profane or Indecent Language Towards Teacher or Staff	301	Directing profane or indecent language toward a teacher, staff member or administrator.	B,C,T	Yes

E. Student Discipline Policy

Leaving School Grounds or Bus Without Authorization	302	Leaving school grounds without the permission of school officials. Exiting the bus at an unauthorized stop or jumping from exit doors or windows.	B,C,T	Yes
Noncompliance With an Administrative Directive or an Assigned Disciplinary Response	303	Repeatedly refusing to follow an administrative directive or to comply with an assigned disciplinary response. Repeated could be defined as repeated defiance happening in one event or multiple incidents over a period of time.	B,C	Yes
Vandalism Under \$1000	304	Willfully destroying or defacing school or personal property. The damage caused is less than \$1000. A child's willingness to repair property damaged or to make restitution will be taken into account in determining appropriate level of response.	B,C,T	Yes
Theft Under \$1000	305	Taking the property of another individual or the school without permission, with the intent of depriving the owner of the property. The value of the property taken is under \$1000. A child's willingness to return or replace item taken or make restitution will be taken into account in determining the appropriate level of response.	B,C,T	Yes
Falsifying School Records	306	Falsifying or altering school records, including, but not limited to, written, electronic or digital school records. This does not include cheating.	B,C	Yes
Inappropriate Sexual Behavior	307	Engaging in mutual activity of a sexual nature that does not meet the criteria of harassment or sexual assault. First offense for sexual intercourse should range between 1-3 days of OSS including a Restorative Conference with guardians upon returning to school. <i>*A referral to DCS will be made. Elementary OSS may only be used to allow time to create a safety plan to meet the needs of the students involved.</i>	B,C,D,T	Yes
Indecent Exposure	308	Intentionally exposing body parts generally considered private. For shirts exposing cleavage, use Code 107 (Dress Code).	B,C,T	Yes
Offensive Touching	309	Engaging in unwanted or offensive touching of areas generally considered private.	B,C,T	Yes
Fighting	311	Mutual participation in an incident involving physical contact (e.g., slapping, closed fists, pulling hair, kicking, biting). <i>*Elementary students may only receive OSS if fight results in injury.</i>	B,C,D,T	Yes
Alcohol or Drug-Like Substance: Use or Possession, Under the	312	Possessing, using or being under the influence of substances that have the potential to intoxicate. A collaborative referral may be required.	B,C,T	Yes

E. Student Discipline Policy

Influence		Students violating this code are not eligible for First Time Drug Offender Program.		
Threats, Class 1	313	A threat to cause harm to students, staff or school in which no plan exists to carry out the threat. The threat must be one that would cause a person to reasonably fear bodily injury. A Building Level Threat Assessment must be completed.	B,C,T	Yes
Possession of a Non-Lethal Weapon or Replica of a Lethal Weapon	314	Possessing a non-lethal weapon, including but not limited to weapon replica, stun gun, BB gun, air gun, air soft gun, pellet gun, cap gun, Orbitz gun, realistic toy gun, etc. Water guns are excluded, but not encouraged to have on school campus.	B,C,T	Yes
Inappropriate Use of Electronic Devices	315	Viewing or distribution of sexually explicit images/videos and/or fights (i.e., air drop, social media post, etc.). If a student's rights are perceived to be violated, this may rise to the level of a Title IX investigation/incident. and standard Title IX procedures should be followed. A teacher may withhold a student's phone from the student for the duration of the instructional time if the student's phone is a distraction to the class or the student. -TCA Title 49, Chapter 2 and Title 49, Chapter 6	B,C,T	Yes
Possession of Other Weapons	317	Possessing an instrument capable of causing serious bodily injury, including but not limited to ammunition, knife, taser, and/or pepper spray. Weapons will be confiscated and turned over to the appropriate authorities. Use of taser and/or pepper spray may result in higher level codes (i.e. 413 – Extreme Disruption or 420 – Reckless Endangerment)	B,C,D,T	Yes
Trespassing on School Grounds	318	Entering and remaining on school property or during school-sponsored activities without authorization. Parents will be called. If student remains on campus, law enforcement may be contacted.	B,C	Yes
Inappropriate Physical Contact Toward School Staff	319	Engaging in intentional physical contact with MNPS staff that does not rise to level of bodily injury.	B,C,T	Yes
Gang Activity: Recruitment, Display or Possession of Symbols or Paraphernalia	320	Displaying gang symbols, gang paraphernalia or participating in the recruitment/initiation of a student into a gang (violent or disruptive group).	B,C,D,T	Yes
Use of Tobacco Products	321	Using any tobacco products, including but not limited to, cigarettes, cigars, vapor or e-cigarettes, or chewing tobacco. For the first offense, a B response will be used. All items will be confiscated and not returned. Students under 18 will be issued a citation.	B,C,D,T	Yes

Type 4 Behaviors

Harassment of School Staff	400	Repeated incidents of intentional verbal, electronic, sexual, or physical harassment or intimidation directed at teachers, administrators or school staff. Documentation of incidents must be included in referral.	C,D,E	Yes
Assault of a Student	401	Intentionally, knowingly or recklessly committing an unprovoked physical attack on another student. Minor physical contact, such as pushing or shoving, does not constitute assault. Students may not receive the same disciplinary consequence for their involvement in an altercation if the school administrator determines they acted in self-defense to protect themselves from physical harm (TCA 49-6-3401). <i>Response E may be used if the assault or the resulting injuries are severe. When response E is used, evidence documenting the incident's severity and any resulting injuries must be included in the discipline referral.</i>	D,E	Yes
Under the Influence of Illegal Drugs and/or Controlled Substance	402	Being under the influence of any illegal drug(s) and/or a controlled substance not authorized for use by the student (e.g., prescription medicine) while on school grounds or at school-sponsored activities. 1st offense: Mandatory collaborative referral for substance abuse will be made for any student found in violation of this code and up to 3 days suspension for middle and high school; up to 1-2 days suspension for elementary school. 2nd offense: Required to attend First Time Drug Offenders Program (FTDOP) or Counseling and up to 5 days suspension for middle and high school; up to 1-2 days suspension for elementary. If a student does not attend, the student is expelled. 3rd offense: Level E response option	C,D,E	Yes
Threats, Class 2	403	A threat to cause harm to students, staff or to a school. 1. The threat must be verbal or written and include a detailed plan. 2. Evidence must support that the threat is actually or potentially harmful or lethal to the safety of other students or staff in the student's school. 3. A Threat Assessment, Building or District Level, must be completed within 3 school days from when school administrators	D,E	Yes

		are made aware to determine appropriate safety measures and support. A District Level Threat Assessment can be conducted with approval and/or at the discretion of the Chief Officer of Student Services.		
Threats by Electronic Transmission	404	A student who transmits, by an electronic device, a credible threat: 1. To cause bodily injury or death to another student or school employee 2. Creates actual disruptive activity at the school that requires administrative intervention. 3. A Threat Assessment, Building or District Level, must be completed within 3 school days from when school administrator is made aware to determine appropriate safety measures and support. A District Level Threat Assessment can be conducted with approval and/or at the discretion of the Chief Officer of Student Services.	D,E	Yes
Bullying	405	Any intentional act that is severe, persistent or pervasive and substantially interferes with a student's educational benefits, opportunities or performance, and has the effect of: • Physically harming a student or damaging a student's property • Knowingly placing a student(s) in reasonable fear of physical harm or damage to the student's property • Causing emotional distress to a student(s) • Creating a hostile educational environment Bullying incidents must be reviewed for civil rights violations. If bullying is repeated over time and persists after documented administrative intervention, expulsion may result. <i>*Elementary student OSS only if repeated over time and persists after documented administrative intervention.</i> <i>Hazing is an intentional or reckless act on or off MNPS property, by one student acting alone or with others, directed against any other student, that endangers the mental or physical health or safety of that student, or that induces or coerces a student to endanger that student's mental or physical health or safety. Hazing does not include physical contact</i>	C,D,E	Yes

E. Student Discipline Policy

		<i>associated with athletic events, training, or competitions conducted under a coach's or sponsor's supervision.</i>		
Cyberbullying	406	Using technology, including, but not limited to email, cell phones, voicemails, texts, photos, video messages, instant messaging, defamatory websites, social networking sites, online personal polling sites, or journals to bully another student. See the definition of bullying above. <i>*Elementary OSS only if repeated over time and persists after documented administrative intervention.</i>	C,D,E	Yes
Harassment Based on a student's real or perceived race, color, religion, national origin, disability, or ancestry. Harassment is misconduct that: 1. May be perceived or described as bullying, hazing, cyberbullying, discrimination, or intimidation 2. Is based on a student's real or perceived race, color, religion, national origin, disability, or ancestry, and 3. Creates a hostile environment when the conduct is sufficiently severe, pervasive, or persistent to interfere or limit a student's ability to participate in school services, activities, or opportunities. Harassment does not have to include intent to harm, be directed at a specific target, or involve repeated incidents. Includes codes: 407, 408, and 409. <i>*Elementary OSS only if repeated over time and persists after documented administrative intervention.</i> Based on a student's real or perceived sex, sexual orientation, gender identity, gender expression, or appearance. Harassment is misconduct that: 1. May be perceived or described as bullying, hazing, cyberbullying, discrimination, or intimidation 2. Is based on a student's real or perceived sex, sexual orientation, gender identity, gender expression, or appearance; and 3. Creates a hostile environment when the conduct is sufficiently severe, pervasive, and objectively unreasonable to interfere or limit a student's ability to participate in school services, activities, or opportunities. Harassment does not have to include intent to harm, be directed at a specific target, or involve repeated incidents. Includes codes: 410, 411. <i>*Elementary OSS only if repeated over time and persists after documented administrative intervention.</i>				
Harassment Based on Race, Color or National Origin	407	See definition above.	C,D,E	Yes*
Harassment Based on Religion or Creed	408	See definition above.	C,D,E	Yes*
Harassment Based on Gender, Gender-Identity or Sexual Orientation	409	See definition above.	C,D,E	Yes*
Harassment Based on Disability	410	See definition above.	C,D,E	Yes*

E. Student Discipline Policy

Sexual Harassment	411	See definition above. This code should not be used outside of the formal investigation process. Contact your Executive Director and Deputy Title IX Coordinator and Civil Rights Compliance Officer prior to issuing any disciplinary consequence (including the two-day summary suspension option).	C,D,E	Yes*
Assault of a Teacher or Staff	412	Any act, intentional or unintentional, that causes or has the potential to cause physical injury to a teacher or school staff. An assault is more than incidental contact. Pushing or bumping a bus driver while the bus is operating constitutes assault of staff.	D,E,T	Yes
Extreme Disruption of the School Environment or Bus	413	Disrupting the school environment or bus to the extent that the safety of other students is at risk. The discipline referral must include evidence of actual disruption and actual risk of harm. Starting a fire or igniting fireworks constitutes extreme disruption. Using technology to access and alter student records or electronically tampering with MNPS technology systems and services (including but not limited to electronic records, databases, networks, and cloud services) in a manner that impairs normal school functioning constitutes extreme disruption. <i>*Elementary administrators should use crisis response team.</i>	C,D,E	Yes*
Group Fighting	414	Three or more students engaging in a physical altercation. The altercation may include more students against a few students or multiple one on one fights. <i>*Elementary students may only receive OSS if the fight results in injury.</i>	D,E	Yes*
Repeated Violations	415	Repeated Violations of a Pattern. The student must engage in <u>3</u> or more documented incidents of the same Type 3 Code (minimum of 3 within one semester before Code 415 is used). There must be evidence of multiple implemented interventions in which one must include an informal hearing to address the same Type 3 Code. Interventions must be documented in the referral and in Support and Intervention.	C,D,E	Yes
Gang Intimidation	416	A gang-involved student behaving in a way that would reasonably be expected to cause physical injury to any person. Evidence must be provided in the referral showing that a student is gang-involved and intimidation is gang-related.	C,D,E	Yes
Off Campus Behavior: <i>For a felony charge under T.C.A 49-6-3051(b) OR An act</i>	417	Students may be subject to disciplinary action for off-campus behavior when:	C,D,E	Yes

E. Student Discipline Policy

<i>committed against a member of the student's school community that poses a threat to the safety of the school</i>		1. The student's behavior results in a felony charge under T.C.A. 49-6-3051(b): murder, rape, aggravated robbery, kidnapping, aggravated assault, felony reckless endangerment and aggravated sexual battery and the student poses a threat to the safety of other students or staff. 2. When a student commits an act against a member of the student's school community that poses a threat to the safety of other students or school staff in the student's school. 3. A Threat Assessment, Building or District Level, must be completed within 3 school days from when school administrators are made aware of the threat to determine appropriate safety measures and support. A District Level Threat Assessment can be conducted with the approval and/or at the discretion of the Chief Officer of Student Services.		
Sexual Assault	418	Unwanted sexual contact with the use of force against a person's will or when the victim is unable to give consent that poses physical, emotional, or psychological distress or injury upon the victim. This code should not be used outside of the formal investigation process. Contact your Executive Director and Deputy Title IX Coordinator and Civil Rights Compliance Officer prior to issuing any disciplinary consequence (including the two-day summary suspension option).	D,E	Yes
Robbery	419	Intentionally or knowingly taking the property of another person by use of violence or with the use of a weapon.	D,E	Yes
Reckless Endangerment	420	A reckless action in which the behavior causes serious injury or may potentially cause serious injury. The potential harm must be foreseeable by a reasonable person. <i>* Elementary students may receive up to two days OSS for safety planning purposes only.</i>	D,E	Yes*
Fighting: Repeated	421	A middle or high school student must engage in <u>3</u> or more documented fights involving physical contact (e.g., slapping, closed fists, pulling hair, kicking, biting) during the current year before Code 421 can be used. The student is subject to a five-day suspension, or expulsion as determined by the executive principal. An elementary student may receive OSS for up to two days for three fights and five days for a fourth fight.	D,E	Yes*

Vandalism Over \$1000	423	Willfully destroying or defacing school or personal property. The damage caused is over \$1000. A child's willingness to repair the damage or make restitution will be taken into account in determining the appropriate level of response.	D,E	Yes
Theft Over \$1000	424	Taking the property of another individual or of the school without permission with the intent of depriving the owner of the property. The value of the property is over \$1000. A child's willingness to return or replace an item taken or make restitution will be taken into account in determining the appropriate level of response.	C,D,E	Yes
Refusing or Fleeing Drug or Weapon Search	425	A student who refuses to submit to a drug or weapon search when requested is in violation of this code. Reasonable suspicion of drugs or firearms must exist for expulsion. A student violating this code is not eligible for the First Time Drug Offenders Program.		
Type 5 Behaviors				
Zero Tolerance Offenses A Zero Tolerance (ZT) Offense requires expulsion of not less than one calendar year (180 school days) under Tennessee State Law. However, the director of schools or the designee may modify the length of the expulsion on a case-by-case basis through the appeals process or through a request for modification. The following are Zero Tolerance offenses under Tennessee Law.				
Rape	501	Committing oral, anal, or vaginal penetration with use of force, against a person's will or when the victim is unable to give consent.	E	No
Attempted Homicide	502	Attempting to kill another person.	E	No
Homicide	503	Killing another person.	E	No

E. Student Discipline Policy

Drugs	505 (ZT)	Unlawful possession, use or distribution of drugs on school grounds, including any controlled substance or legend drug (prescription drug). Distribution of drugs is defined as the intentional transfer of any prohibited drug for money or other benefit. A collaborative referral for substance abuse will be made for any student found in violation of this code. • If it is the student's first offense under unlawful possession and use, not distribution, of drugs, the student qualifies for the First Time Drug Offender program. • After completion of the 1st Time Drug Offender program, a 30-day follow-up with parent and student to determine what additional services were offered and whether the student/parent participated/completed the services/support provided. MNPS defines distribution based on possession as the following: 1. Possession of 1 or more ounces of any controlled substance and/or legend drug (prescription). 2. Possession of 3 or more vapes containing a controlled substance. 3. Possession of 3 or more items containing illicit substances (e.g., edibles, bags of chips, gummies, etc.).	E	No
Aggravated Assault of Teacher, School Staff or a School Resource Officer (SRO)	506 (ZT)	Intentionally or knowingly 1. Causing serious bodily injury or 2. Committing an assault with a deadly weapon of a teacher, school staff, or SRO. "Serious bodily injury" is injury that requires more than basic first aid. A "deadly weapon" is a weapon, such as a firearm or knife, that is designed to inflict serious bodily injury.	E	No
Explosives	507 (ZT)	Possession of any destructive device, which includes any explosive, incendiary device or poison gas, including bombs, grenades, rockets, missiles, mines and similar devices. Possession of fireworks altered or modified to constitute an explosive may be considered a Zero Tolerance offense only if the altered fireworks are identified as an explosive by law enforcement officials. Fireworks are not considered an explosive.	E	No
Firearm	508 (ZT)	Possession of a firearm or bringing a firearm to school. This includes but is not limited to, handguns, rifles and shotguns. As required by state and federal law, any student who brings a weapon to school will be referred to law enforcement.	E	No
Threats, Class 3	509 (ZT)	Threatens mass violence on school property or a school-related event. In accordance with § 39-16-517, the threat must be verbal or written and, if	E	No

	implemented, would have the potential to cause serious bodily injury, as defined in § 39-11-106, or the death of two (2) or more persons, as determined by the results of a Building or District Level threat assessment. The Threat Assessment must be completed within two (2) school days from when school administrators are made aware of the threat. A District Level Threat Assessment can be conducted with approval from the Chief Officer of Student Services.		

Response Levels

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:
 - Alert them of the infraction
 - Get parental perspective on solutions (parent voice)
 - Share the outcome of the restorative intervention
 - To encourage at home support for the identified classroom expectation
 - To discuss, if necessary, the need for additional supports 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 in S & I.

Level B: Administrative Referral

1. The 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 formal plan will be created to support the students' 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.
4. If school-based resources are unable to address the student's needs, a Collaborative Referral is created.
5. All interventions should be documented in the Student Management System (Infinite Campus) and provided to the parent or guardian.
6. 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.
7. 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 Collaborative Referral.

Level C: Suspension Option

1. Steps one through five are repeated from Level B.
2. If necessary, the administrator may:

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.

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.

A formal restorative conference must occur upon return from suspension with all necessary parties including RPA's and Advocacy Center Coaches to establish or modify the student's Plan of Support. Restorative conferences/re-entry meetings must be documented in Support & Intervention (S&I). 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 the administrator may:
 - 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.
 - 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.
 - Code 414 ONLY - Group Fight violations, up to a 10 day suspension option may be used in lieu of expulsion for middle and high.

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 in the Student Management System (Infinite Campus). 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.

Level T: Transportation Suspension Option

For certain behaviors occurring on the bus affecting student safety, a student may be suspended from the bus for a maximum of three days. The T response may only be used for behavior occurring on the bus. When a student is suspended from the bus, they may still attend school but parents are responsible for transportation. Recognizing that some students do not have alternate transportation when suspended from the bus, a bus suspension will only be used if the bus driver has not been able to address the student's behavior by reminding the student about behavioral expectations on the bus, having a restorative conversation with the student, changing the student's assigned seat, and calling a parent/guardian to address the concern. The bus driver will utilize restorative approaches to behavior when the bus is in a safe and secure location prior to initiating a referral to school administration. The driver's discipline referral to the school will include interventions tried prior to referral.

LEAD Public Schools Enrollment Policy: MNPS Authorized Schools

Enrollment Calendar - Many of our families have students in multiple schools across Davidson County. To keep enrollment as simple as possible for our families, we choose to mirror the process and timeline of the MNPS Optional Schools process whenever possible, regardless of school authorization. We have worked collaboratively with the team at MNPS to align our calendar and communications for compliance and alignment.

Some of the dates listed below are subject to change based on the uncertainty of the approval and authorization process.

School Capacity- To comply with the MNPS timeline, we would communicate our capacity to enroll in January as a part of our lottery process. Our enrollment capacity shall be posted at least 14 days prior to the beginning of the open enrollment period which would be Monday, January 30, 2025. In order to provide timely enrollment estimates to the Department of Education, the enrollment period and lottery will conclude by March 15, 2025.

Application Platform- We are currently in the final stages of reviewing both SchoolMint and SmartChoice as platforms for our application. Our organization and Director of School Enrollment have prior experience with SchoolMint, and Smart Choice is being currently utilized with our network of campuses. Both systems integrate with Powerschool. We will make a final decision upon learning more about the compliance requirements of the MNPS.

Application Template - If approved by MNPS, and with the later start date, we will submit for approval an application template that we plan to utilize by Monday, January 27, 2025 for review (in future years, knowing that typically this is by January 20). This application will not discriminate on the basis of race, color, national origin, sex, disability, and age. Applications will be made available in the predominant languages of the LEAD community which are English and Spanish. If we receive more applications than the planned capacity, LEAD will conduct a lottery in accordance with Tennessee Code Annotated (T.C.A.) §49-13-113.

Proposed Open Enrollment/Lottery Calendar

AUGUST - JANUARY, 2025: Interest and LEAD Generation

The LEAD Public Schools Family Engagement Team will work with community partners and community stakeholders as articulated in its recruitment and community engagement strategy to begin sourcing applications and leads for the upcoming optional schools process for LEAD Elementary.

MONDAY, JANUARY 27, 2025: Optional Schools Applications Sent Home

MNPS will send applications home with all students. LEAD Public Schools will also support in ensuring that all LEAD families support this process in disseminating applications to attending families. This includes “pathway continuation forms” for students moving from elementary to middle or middle to high school on an approved pathway. This also includes applications from grades 11 and 12.

FRIDAY, FEBRUARY 7, 2025: Optional Schools Application/Pathway Deadline (by 4:30 p.m.) *

Parents return forms to the Office of School Options. Applications received by this deadline will be part of the random selection process on Selection Day. This deadline also includes all “pathway continuation forms”

for students moving from elementary to middle or middle to high school on an approved pathway. Applications received after Friday, February 7, 2025 will be placed at the end of the waitlist. As participants of the MNPS Optional Schools process, we comply with this requirement as outlined by MNPS.

MONDAY, MARCH 3, 2025: Optional Schools Selection Day Results Available

Selection day results for kindergarten through grade 10 are available at <https://www.mnps.org/school-options> or contact the MNPS Family Information Center at 615-259-INFO(4636). (Students in grades 11 and 12 are not included.) Applicants to LEAD Public Schools will also be able to contact a member of the LEAD Public Schools Family Engagement team to be supported through the optional schools selection process.

WEDNESDAY, MARCH 5, 2025: Optional Schools Acceptance/Waitlist Letters

Acceptance and waitlist letters will be communicated to parents on this date.

FRIDAY, MARCH 7, 2025: Optional Schools Application Deadline for Grades 11 & 12 (by 4:30 p.m.) *

Applications received by this deadline will be part of the random selection process for grades 11 and 12. Applications received after Friday, March 8, 2025 will be placed at the end of the waitlist. This process is applicable to LEAD Academy High School and LEAD Southeast High School, both of which are participants of the MNPS Optional Schools process.

FRIDAY, MARCH 21, 2025: Deadline to Return Optional Schools Acceptance Letters (by 4:30 p.m.) *

The acceptance letter must be returned to the Office of School Options on or before this date. Parents may also accept online at the following link: <https://www.mnps.org/school-options>. The LEAD Public Schools Family Engagement Team supports families with this process in ensuring that forms are returned and that they adhere to the communicated deadlines.

FRIDAY, MARCH 21, 2025: Optional Schools Selection Day Results for Grades 11 & 12

Results for grades 11 and 12 are available at the following link <https://www.mnps.org/school-options> or contact the MNPS Family Information Center at 615-259-INFO(4636).

MONDAY, APRIL 7, 2025: Deadline to accept seat for Grades 11 & 12 (by 4:30 p.m.) *

WEDNESDAY, MAY 7, 2025: 2025-2026 Student Placement Verification will be communicated.

On this date, applicants to LEAD Public Schools will receive communications from the LEAD Public Schools Family Engagement Team confirming their intentions for the 2025-2026 academic school year. We will also communicate to MNPS those families that have since declined their spot and have voiced intentions on attending another MNPS or Charter school.

WEDNESDAY, JULY 23, 2025: Last Day for Families to Apply for Optional Schools with Limited Seating

FRIDAY, AUGUST 22, 2025: Last Day for Current MNPS Students to Apply to Optional Schools with Available Seats

New MNPS families may apply year-round to optional schools with available seats. Families wanting to select a MNPS Charter School may also apply year-round.

** Online submissions close at 11:59 p.m. CST*

***Available Seats** - Families may apply year-round to LEAD through our Open Enrollment process and placement will be granted based on placement on the waitlist and enrollment capacity.

Enrollment Procedures

LEAD Open Enrollment/Lottery

- All interested applicants must adhere to the stipulations as outlined by the MNPS and complete an application that will be considered based on the choice of the parent, legal guardian, or custodian. All eligible students who submit a timely application shall be enrolled in the school, unless the number of applications exceeds the capacity of the program, in which case enrollment preferences and a lottery shall be instituted pursuant to state law and State Board rules.
- If family members need support with their application, a member of our Family and Community Engagement Team will be able to assist you and your family with your application.
- All admission and enrollment policies of the authorized charter schools shall restrict discrimination for any reason prohibited by state and/or federal law.
 - **LEAD will operate a lottery process that adheres to the qualifications as outlined by the MNPS** - LEAD will offer a calendar of activities that will ensure that participating families are able to make an informed decision about their enrollment decision as it relates to LEAD being authorized by the Tennessee MNPS.
 - Upon successful completion of an application, families are offered a seat via the lottery based on the communicated allotment of available seats. Families are offered a seat and are given an allotted amount of time (designated by the MNPS) to accept the seat. If the seat is not accepted within the allotted time, the seat is then offered to the next person in the lottery or waitlist. Those applicants that missed their offered seat, are then required to submit a new application and are considered based on their spot on the waitlist.
 - The LEAD Public Schools team will communicate with families based on the offers made via the lottery process in compliance with the lottery process, and any geographical, sibling, intra-network, or staff preferences are granted based on predefined business rules established collaboratively with the Director of Enrollment and the MNPS.

Nondiscriminatory admission policies, pursuant to T.C.A. § 49-13-107;

LEAD follows both district and state guidelines regarding student enrollment procedures. LEAD Public Schools are open to all students in Davidson County who meet the eligibility requirements under Tennessee law. LEAD Public Schools does not discriminate on the basis of sex, race, national origin, creed, age, marital status, or disability in its educational program, activities, or employment policies as required by Title VI and VII of the 1964 Civil Rights Act, Title IX of the 1972 Educational Amendments, Section 504 of the Federal Rehabilitation Act of 1973, and the Americans with Disabilities Act.

Articulation plans or agreements, pursuant to T.C.A. § 49-13-113;

LEAD Southeast Elementary will have an established pathway to LEAD Southeast Middle School. This preferential treatment means that upon successful completion of a pathway continuation form, applicants are granted a seat to attend LEAD Southeast Middle School. Students that attend the middle school grades of LEAD Southeast matriculate on to our high school. If approved, LEAD students will be able to attend our school through successful high school graduation.

At LEAD, as a part of our customer experience, we support all of our students with getting into a school of their choice. Should LEAD students not be interested in attending LEAD Southeast Middle School, our

Family and Community Engagement Team will work closely with our campus counselors in supporting graduating 5th grade students with middle school placement. Our 5th grade students through their middle school placement work will work to identify their school of choice and the Family and Community Engagement Team will work closely with the family throughout the application process.

Identification of any pre-admission activities for students or parents

LEAD does not require participation in any pre-admission activities for students and parents. However, we do encourage families and students to participate in a range of events to ensure a smooth transition to the LEAD community. For example, both new and returning students are encouraged to attend orientation prior to the start of the school year. The purpose of orientation/open house is for families and students to update family and student information, receive information on new or changed school policies and expectations, school culture, as well as ask questions and address concerns prior to the start of school. Also, each new to LEAD family meets with a member of the LEAD Public Schools faculty and staff and completes a commitment to LEADership meeting to learn the expectations for attending a LEAD Public School.

Policies and procedures for student waitlists, withdrawals, re-enrollment, and transfers.

Waitlist Management:

- **Initial Funding Estimates** - At the conclusion of the application period and lottery process, if necessary, but no later than March 15th the charter school will notify MNPS of the following information in order for initial funding estimates to be calculated by the Department of Education:
 - Total enrollment projections for the upcoming school year;
 - Number of students with disabilities and the school system the student would otherwise be enrolled in (if known);
 - Number of at-risk students (defined as students who for Direct Certification, students in foster care, and homeless, runaway, and migrant students); and
 - Number of English Learners (if known).
- **Waitlists will be maintained based on communicated capacity.** Families are offered a seat via the lottery based on the communicated allotment of available seats. Families are offered a seat and are given an allotted amount of time (designated by the MNPS) to accept the seat. If the seat is not accepted within the allotted time, the seat is then offered to the next person in the lottery or waitlist. Those applicants that missed their offered seat, are then required to submit a new application and are considered based on their spot on the waitlist.
- The LEAD Public Schools team will communicate with families based on the offers made via the lottery process in compliance with the lottery process, and any geographical, sibling, intra-network, or staff preferences are granted based on predefined business rules established collaboratively with the Director of Enrollment and the MNPS.

Registration Process - As a part of the enrollment process, any student entering school for the first time must present:

- A birth certificate or officially acceptable evidence of date of birth at the time of registration;
- Evidence of state-required immunization.
- Any student enrolling for the first time in a US school, should provide evidence of a current physical examination dated within the last calendar year;
- **If a parent is unable to provide requested documentation:**

- If a parent does not have or cannot obtain a birth certificate, it is within the charter school's discretion to determine which documents are acceptable as proof of birth.
- A charter school cannot deny enrollment based on the inability to produce social security cards or numbers, health forms, birth certificates, or other information.
- A charter school can only require immunization records for enrollment. Please see the McKinney-Vento section of the document for additional information regarding students who are homeless. 4 T.C.A. § 49-6-3008(b) 5 T.C.A. § 49-6-5001(c) 6 TRR/MS 0520-01-03-08(2)(a); T.C.A. § 49-6-5004(a) 7 T.C.A. § 49-3-5001, MNPS LEA Policy 6203 – Physical Examinations and Immunizations
 - No family should be sent home to collect additional documentation prior to enrolling the student, and if the charter school asks for this additional documentation, the school shall immediately state that no documentation will be used in relation to immigration status.
 - If a student does not have the required immunizations, the school shall work with the family to schedule an immediate appointment for the student to receive the required immunizations. Students may be exempt from immunization requirements due to medical or religious reasons. The school leader shall make the exemption determination and shall retain documentation of exemption from the parent/guardian.
- **Proof of residency:** The charter school will use all resources available to them to assist in determining if enrolled students reside in the jurisdiction of the charter school, including but not limited to proof of residency, utility bills, real estate records, and home visits. It is within the discretion of the charter school to determine which documents are acceptable as proof of residency.
 - **All student information must be complete and entered into MNPS's approved student information system by August 31 of each school year.** Students enrolled after the start of a new school year must be entered into MNPS's approved student information system by the charter school within one (1) business day of a student's enrollment in the charter school.
- **Withdrawal Process** - If the family of a student chooses to withdraw the student from the charter school, the school shall complete the following steps:
 - Have the parent(s)/guardian(s) complete the school's withdrawal document(s), indicating the reason(s) they are seeking withdrawal.
 - If possible, schedule a meeting with the student and parent(s)/guardian(s) to discuss the reason(s) for withdrawal and school options. The LEAD Exit Interview Form is available upon request, but will be kept as a part of our withdrawal paperwork in the front office.
 - Update the student's enrollment information and reason for withdrawal in MNPS's student information system within one (1) business day of the student withdrawing; and
 - Provide the student's records when requested by the school or district in which the student will be enrolling
- **Record request**
 - Once a student enrolls in the charter school, the school shall immediately request the student's records from the student's previous school.
 - **Since we are located in Davidson County, the following process as outlined by the MNPS shall be used:**
 - **Contact the school from which the student is transferring to request a copy of the student's cumulative file, including the student's Individualized Education Program (IEP), behavior plans, or ILP and EL folder if applicable.** The charter school should clearly indicate on the records request that the requesting charter

school is outside of the receiving school's district. Upon receiving a records request, the receiving school will send the student's records to the Metro Nashville Public Schools central records office, which will then forward an electronic version of the student's records to the requesting charter school.

- **If the student's previous school is unresponsive or the student's records have not been received within three (3) weeks of a request**, then the charter school shall contact the Metro Nashville Public Schools central records office to request a copy of the student's records.
- **If Metro Nashville Public Schools is unable to provide the student's records**, the charter school shall contact MNPS. When a student with an IEP enrolls in the charter school, the school is required to complete the IEP development process as soon as possible after the student's enrollment, even if the school is unable to obtain the student's cumulative records within 30 days.
- **Commitment to LEADership Process** - Each new to LEAD family meets with a member of the LEAD Public Schools faculty and staff and completes a commitment to LEADership meeting to learn the expectations for attending a LEAD Public School.
- **Identification of English Learners/Enrolling Students with Disabilities/Identification of Homeless Students/Identification of Immigrant Children and Youth/Identification of Students in Foster Care/Identification of Migrant Students/Identification of Military-Connected Students** - LEAD will adhere to the Enrollment Policy # 1006 as outlined by the MNPS.
- **Re-Enrollment Process at LEAD Public Schools (Returning LEAD Families)**
 - Intent to return forms are sent home with students who have current enrollment at LEAD and need to confirm a seat for the upcoming school year. These forms will be sent home annually by January 31st. Families are given one week to complete the form and return it to the Family Engagement Coordinator. LEAD Public Schools enjoys working with all of our families and students and requires all families complete and return an intent to return form by the deadline provided.
 - **Continuation Form Process** - This process is conducted by the Family and Community Engagement Team in collaboration with the campus team from December through March of every year and is meant for families to communicate their enrollment intentions for the following year. We have a standardized form that we utilize for each of our LEAD campuses, and will continue to use the same form with LEAD if authorized through the MNPS. This form is available upon request.
 - **Census Verification Form Process** - As a part of our re-enrollment process, every returning LEAD student is required to submit an Enrollment/Census Verification form which provides updated family information for our Student Management System. This will be a process that we will continue as a part of our May Verification Process if we are authorized by the MNPS. We have a standardized form that we utilize for each of our LEAD campuses, and will continue to use the same form with LEAD if authorized through the MNPS. This form is available upon request.
- **Intra-Network Transfers** - LEAD Public Schools students get preferential treatment when applying to transfer to another LEAD Public School. Transportation is not guaranteed, though preference is given for enrollment. In order to be considered, families must complete an application and contact their Family and Community Engagement Coordinator for next steps.
 - To request a transfer out, a family should complete and submit an application and meet with the sending school in order to ensure a smooth transfer.

- Within a week of receiving the request, a member of the sending school will contact the receiving school to confirm availability, and also ensure that capacity and successful completion of all required paperwork.
- A meeting with the family will be conducted to ensure that any concerns are heard and addressed, and that the family has been adequately informed of options. If the family affirms the decision to transfer or withdraw after the meeting, LEAD will attempt to coordinate with the new school that the family indicates that they will be attending, to ensure a smooth transition. Additional processes may exist to ensure appropriate service for students with disabilities or other special needs. In the event that the receiving school cannot adequately serve a student's needs or there are extenuating safety, discipline, or medical issues, school leaders will work with the sending school to find a suitable administrative placement.

To Whom It May Concern:

I am the Director of the Male Initiative at The Black Mental Health Village. My role is to facilitate & promote a variety of programs that are designed to aid the holistic wellness of Men. I worked with LEAD at the Cameron Site during the past school year, and have been a community partner for 2 years. It is always a joy to serve our youth and we look forward to working with them again for future years. We are thrilled to partner with LEAD Cameron on these annual Initiatives:

- The Napier Day Parade & Block Party
- The Athens of the South Mural Project

These initiatives foster a sense of community and belongingness for residents of South Nashville, and I feel that it has been a tremendous asset as a morale builder and safety improver in the 37210 neighborhood. We value community, and consider the LEAD Cameron school to be a partner that shares in this desire to impact families and serve the Nashville community in amazing ways. This partnership has been a mutually beneficial one, and one that hope to see retained through LEAD Public Schools continued operation of the Cameron campus.

Sincerely,
Joseph Bazelais
Director of Male Initiative
Black Mental Health Village
615-720-5611

May 14, 2024

Letter of Support for the expansion of Lead schools

To whom it may concern:

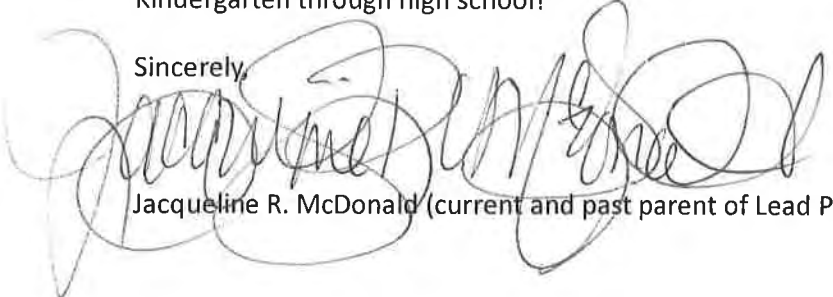
As a parent of a graduate from Lead Southeast Highschool and a parent of a Lead high school Junior, I am in support of opening Lead elementary schools.

First, the population in southeast Davidson County has grown by "leaps and bounds". There has always been an issue of schools being overcrowded and of course the situation has become more severe. Most parents, if not all, want the best education for their child(ren). In, choosing a school, a parent must take into consideration location, transportation, test scores, diversity among the staff and students, and the climate of the school. I was not impressed or satisfied with the schools available to us in Southeast Nashville at that time. As a parent who could not afford private schooling for my children, I chose elementary schools close to where I worked. At that time, I worked in West Nashville. I drove my children to and from school. I had to put them in the before and after school program, but it was worth it. Those schools were less crowded, and I felt more comfortable with the schools. Based on middle and high school experiences at Lead, if a Lead elementary school had been available back then, I probably would have made it my school of choice. When it was time for Middle school, I placed my child in a Lead school that was in West Nashville only to find out it was closing and moving. I did not look for another middle school because I wanted to place her at Lead. I was blessed to be able to transfer her. I am pleased with the outcomes of my graduate and pleased with the progress of my currently enrolled student.

Second, an elementary school will be beneficial to families in the Southeast Nashville community. With the growth in the area, "good" schools are needed. Parents need more options in how their children learn and are taught. Lead has so much to offer, so why not catch a child at an early age? I know that families will benefit having an elementary school in the area. A school that is nurturing and caring to the students and families. A school that has a child's educational interests and gains at heart. With the influx of families moving to Nashville from various states and countries, Lead has an opportunity to be impressionable upon these families.

Once again, I do advocate and support Lead in expanding by opening Lead elementary schools. Who knows, maybe Lead can acquire enough land to have a Lead campus. This campus could encompass Kindergarten through high school!

Sincerely,



Jacqueline R. McDonald (current and past parent of Lead Public Schools)



May 13th, 2024

To whom it may concern,

Nashville Teacher Residency enthusiastically supports LEAD Public School's efforts to enhance the quality of education at their five public charter schools and expand their impact to the elementary level in the Nashville community. Our organization is dedicated to improving student outcomes by ensuring teachers have the training and support to engage in rigorous classroom instruction, and LEAD Public Schools has been an invaluable partner to us. LEAD Public Schools stands out as a network that is relentlessly committed to ensuring all students have a high-quality educational experience. We are confident that their expansion efforts will have a long-lasting impact on the lives of students and families in the greater Nashville community.

Sincerely,

A handwritten signature in black ink that reads "Matt Cheek". The signature is written in a cursive, flowing style.

Matt Cheek
Executive Director
Nashville Teacher Residency

May 16, 2024

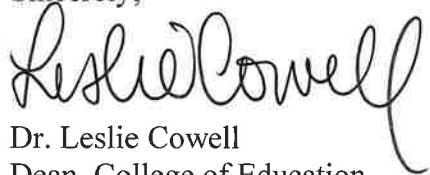
To Whom It May Concern,

Lipscomb University enthusiastically supports LEAD's efforts to enhance the quality of education available for all students at their five public charter schools serving Nashville students and families. We share a commitment to innovation, diversity, and excellence in education and we believe that LEAD has the dedication, passion, and expertise to continue in their great work moving into schools offering elementary education programming.

Our organization is dedicated to improving outcomes for students by ensuring teachers have the training and support to engage in rigorous classroom instruction. LEAD Public Schools is a strong partner in this endeavor and we enthusiastically support their initiatives to make a positive difference in the lives of students and families in our community.

Please do not hesitate to reach out if there are any other ways we can further support the efforts of LEAD Public Schools.

Sincerely,



Dr. Leslie Cowell
Dean, College of Education
Lipscomb University

To Whom It May Concern

I think a LEAD elementary school would be great in the southeast area because of what all they have done for my middle school children at lead. LEAD has helped my children with opening up more. They have also helped teach them about being more confident. LEAD just seems to bring out the best in kids and I think they could do that for even more children if they were to open an elementary school.

Chasity McElrath (870) 319-0626
Future LEAD Cameron Mom

First:

I would like to thank all the people in charge, and the teachers of LEAD schools, since this was the first year for my kids, and they had liked LEAD.

Secondly,

we are looking in the next coming years that there can be an elementary for LEAD as there is a middle & high school. And since I have a ~~little~~ young child and I would love for him to be with his siblings in school.

Ereeny Maguib SC
Waheed Maguib
LEAD Southeast Middle

أولاً :

أحب آسك كل المسؤولين والمدرسين في مدارس
LEAD public schools

حيث هذه كانت أول سنة لأولاد فيها

وقد أحبه مدرسة ليد LEAD

وثانياً :

نتطلع أن يوجد في السنوات القادمة أن يكون

هناك للأيتام LEAD مثلها يوجد مدرسة

ليد للأيتام والتأويث وصيت لهدى طفل

صغير وأود أنه يلتحق بمدرسة ليد مثل إخواته

ولكم منا جزيل الشكر.

ومبرمجيب

Wahed Naguib 59/14
20/24

To Whom it May Concern

I believe that a LEAD elementary school in the Antioch area would be a great idea. Having lived in Antioch for some time, I have seen the changes that have taken place over the last several years. Both of my children have benefited from the LEAD environment and the culture that is promoted through the school. There are many people that have moved into the Nashville area, and the Antioch area has seems to be quite popular for this movement. The corporations and retail advancements that have come into the area bring additional families and traffic. Having the LEAD culture be established early and close to home, would be a benefit to the community going forward. The children will be able to come up in a safe and familiar environment, lending them an advantage as they matriculate through their education careers. Change for today's youth is already challenging enough, and some suffer because they cannot find their way in a new space. Already knowing what to expect from LEAD middle and high before arriving, will make the transition seamless. The staff and students will have opportunities to interact early on, thus making students feel confident as they progress. This will also enhance the opportunities for sports and other activities. Having a connection to and exposure to the staff will foster development in those areas. Growing and having a strong base in community is essential to the success of any institution. Although my children are out of the elementary age ranges, but I fully support the idea of a LEAD elementary school in the Antioch area.

Thank you,

Jerrel L. Frazier | Contracts Analyst, Contract Administration
HealthTrust | 1100 Dr. Martin L. King Jr. Boulevard, Suite 1100 | Nashville, TN 37203
o: 615.344.3954
jerrel.frazier@healthtrustpg.com | www.healthtrustpg.com



To Whom it may concern,

I am a LEAD Southeast parent and have been since the 2nd year that location was open. My oldest son started there in the 5th grade, and he was apart of the 2nd graduating class in 2022. (if I am not mistaking). He just completed his Sophomore year at Western Kentucky University in Bowling Green Kentucky.

I enjoyed and appreciated the staff and the criteria so much I enrolled my other son at LEAD Southeast when it was time for him to enter into his 5th grade year and in a couple of weeks, he will complete his 10th grade year. I am a PROUD LEAD PARENT.

I appreciate the LEAD school system for a number of reasons and here are just a few.

The teacher student ratio. Smaller classes make it more personal. The students have more one on one time with the teachers and as a parent it seems like both the staff and the students are more engaged with one another.

For the most part, the communication is open between teachers and parents/guardians. From as far back as I can remember, I am able to contact any teacher for question or concerns up til 6:30 or 7pm. Homework, behavior, questions about school events, etc. but within reason.

My youngest son had been at Southeast since the 5th grade, and he begged to try something difference. He asked to go to a Metro Public School for Freshman Year, and I agreed with restrictions. The deal was, make good grades, stay focused, and stay out of trouble (although he is NOT a troubled or bad kid) and if he did all 3, he could go back the next year.

Well, he got lost in the system. By that, his grades fell from having As, B's and occasional C's at LEAD Southeast to B's C', D's, and an F.

He was tardy to class over 30 times. He learned the hiding spot in that large school. His new school had over 2000 students, and it was a shock to my son. Going from maybe 400 students to 2000, he got lost in the system and learned how to be invisible, which was the wrong move. Grades dropped, attitude changed, and as a parent I had to get him back to where there was structure and accountability. Why not back at LEAD Southeast where it started. I am not saying that Public school did not have what my son needed but for his first time in High School, I feel like he was lost, and that school failed to keep him on track. I did not get any phone calls and there was not communication. So why not LEAD.

This is why I think an Elementary school would be a great asset to the community.

Jaimee Holbrooks RN, BSN
Orthopedic Case Manager I
Transition Management Office
Office Phone: 615-875-2498
Fax: 615-322-3431
Pager: 615-835-5110
Cell Phone: 615-364-6310

jaimee.holbrooks@vumc.org – Please update your records to reflect my new email address

Good morning,

I am happy to share that as a current LEAD parent of a Grade Six student and a 2022 graduate, I determine that LEAD is an educational institution that impacts the lives of everyone who comes into its hands. Citing my experience of coming from Kenya, which has a different system of education and culture, my children received guidance that helped them manage the change and adapt to the system. Teachers and other staff keep in contact with us, directing us to resources that support the well-being of our children so that they can succeed in their careers, as well as showing us how we can participate in working for that success. Now, I feel a sense of belonging to LEAD, where I can share my comforts, concerns, and suggestions with the LEAD Family. And it is in light of this belonging that I propose Lead to consider/pursue having an elementary school.

With thanks.

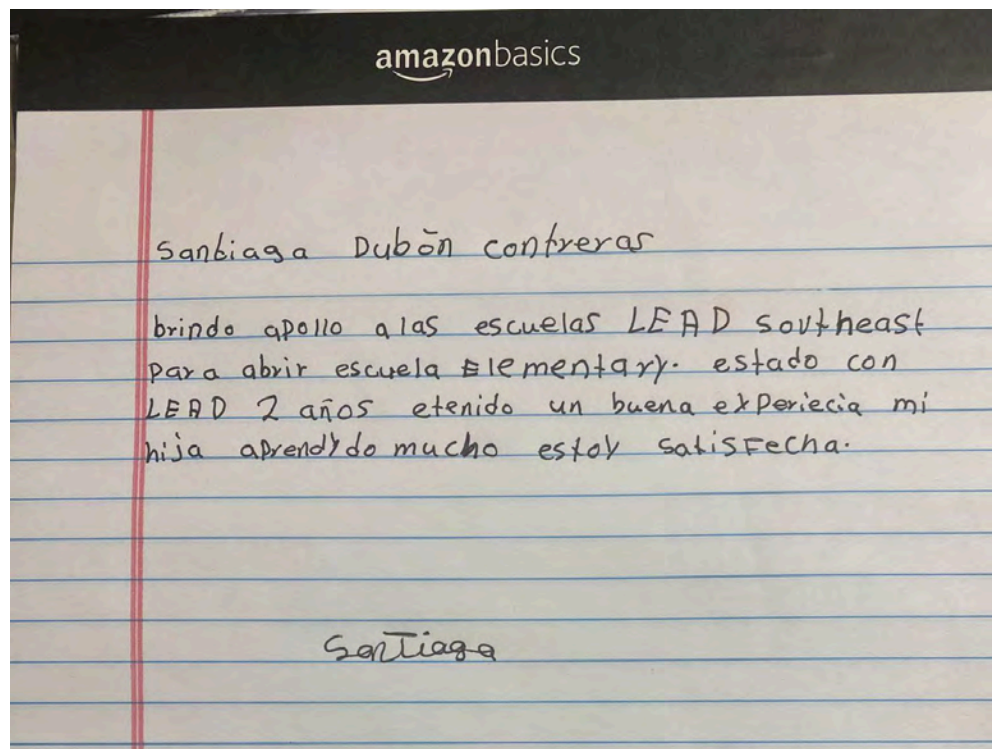
Mr. Lucas Waweru, father of Timothy Waweru 6th grade

Brindo apoyo a las escuelas de LEAD Southeast para abrir escuela elementaria. He estado con LEAD 2 años, he tenido una buena experiencia, mi hija ha aprendido mucho y estoy satisfecha.

Santiago Dubon Contreras 6th and 5th grade parent

I provide support to LEAD Southeast schools to open an elementary school. I have been with LEAD for 2 years, I have had a good experience, my daughter has learned a lot and I am satisfied.

Santiago Dubon Contreras 6th and 5th grade parent



May 13, 2024

To whom it may concern

Lead's teachers have helped my kids, my son and daughter a lot. My daughter now goes to Hume Fogg thanks to the principal who has helped her reach this amazing accomplishment and be valedictorian in lead southeast. My son always comes home with stories about how teachers are helping and encouraging him. He is the president of the school's ambassador team. Overall lead has helped my kids accomplish many things and I really appreciate their hard work. I hope that you will consider opening a elementary school for lead. More students should continue going to lead schools.

Sincerely,

Mina Katreen, The parents of lead students

05/13/2024

To whom it may concern,

I'm submitting the support letter for lead Southeast Elementary Schools. Lead has been a big change for my boys. The team of teachers, principals and counselors are so supportive with the children. They always care like family and very commutative with parents for any concerns on our children's learning or behavior. They get our children ready for the future to better them to choose what they want to do in life. I'm really impressed how a transfer from MNPS to Lead Southeast has impacted to better my children. They really work with the children with respect, learning and behaviors. My youngest son is diagnosed with ADHD and he struggles with it every day. The support group is very awesome and patient with my son's disability. I love Lead Southeast all around. I think it would benefit if they bring in Lead Southeast Elementary schools in our community and start with the younger children. I believe other families would be grateful as well. Lead Southeast has made a change for my children's learning and makes my children even want to go to school. I highly recommend that they bring in Lead Southeast Elementary schools to our community.

Thank You,

Mrs. Misty Stinson

[1305 High Meadow Ct. Antioch, TN 37013](#)

Cell#(615)335-4869

To Whom It May Concern

LEAD is taking a good care of our children. As a parent I feel that my children are in safe hands and safe environment where they can learn a lot not only academic but also life lessons. LEAD impacted our children positively. The diversity really is one of the most advantage in LEAD where children can learn how to respect differences. I hope that LEAD can have a elementary to help more children like mine.

Rawia Abukalam

r.abukalam@hotmail.com

My son started his 5th grade in Lead and finished his highschool, he had enough support and guidance to achieve his goals and earn his credits for graduation. He graduated last year. This 2024 my youngest son is starting 5th grade. He's excited for this new journey at Lead.

Lead it's a great school for our children and our community. Lead has a great team and leadership that involves families from all over the world. I would feel excited if we could have an Elementary school here in Nashville. The quality of support that we received as parents for our students education lets us know that our children are also being prepared for their future. I'm confident that by having an elementary school, it would insure us that our kids would be even more prepared for their middle school and high school journey.

Sincerely,

Raquel Chaparro

To Whom It May Concern

I feel it would be very beneficial. My reason is because I know they will help the children reach their own full potential and really care about them succeeding and really doing there best to be at the educational level they should be at. I have witnessed this with my own children who have attended Lead middle school and high school, and I'm just very pleased with how much my children have learned from Lead. So I feel it would be a great thing for the school, community and the families who are at Lead and those who would like to attend Lead during elementary if offered.

Vannetta Matthews

vannetta28@gmail.com

Future LEAD Family - Incoming 6th Grade Student

FILED

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**AMENDED AND RESTATED CHARTER
OF
LEAD PUBLIC SCHOOLS, INC.**

2010 JUN 29 PM 3:43

**TRE HARGETT
SECRETARY OF STATE**

Pursuant to the provisions of Section 48-60-106 of the Tennessee Nonprofit Corporation Act, as amended, the undersigned corporation hereby adopts the following Amended and Restated Charter.

1. The current name of the corporation is LEAD Academy, but pursuant to this Amended and Restated Charter, the corporation is renamed: "LEAD Public Schools, Inc."
2. The text of the Charter is hereby deleted in its entirety and replaced by the following text:

**I.
NAME**

The name of the corporation is LEAD Public Schools, Inc. (hereinafter referred to as the "Corporation").

**II.
PUBLIC BENEFIT CORPORATION**

The Corporation is a public benefit corporation and is not for profit. It is intended that the Corporation shall have the status of a corporation which is exempt from federal income taxation under Section 501(a) of the Internal Revenue Code of 1986, as amended (hereinafter referred to as the "Code"), as an organization described in Section 501(c)(3) of the Code.

**III.
OFFICE AND REGISTERED AGENT**

The address of the registered office of the Corporation shall be 1704 Heiman Avenue, Nashville, Davidson County, Tennessee 37208. The registered agent at that office shall be Jeremy D. Kane.

**IV.
PRINCIPAL OFFICE**

The address and county of the principal office of the Corporation shall be 1704 Heiman Avenue, Nashville, Davidson County, Tennessee 37208.

**V.
INCORPORATOR**

The names of the original incorporators by original charter filed on March 3, 2005 were Jeremy D. Kane and Michael P. Martin.

BILL GARRETT, Davidson County

Trans: T20100041081 CHARTER

Recvd: 07/06/10 09:15 6 pgs

Fees: 7.50 Taxes: 0.00



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TRE HARGETT
SECRETARY OF STATE

VI.
NONPROFIT; NONRELIGIOUS

The Corporation is not-for-profit and is not a religious corporation.

VII.
NO MEMBERS

The Corporation will not have members.

VIII.
PURPOSE

The Corporation is organized exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the "Code"). Specifically, the Corporation shall establish and operate one or more Charter Schools in accordance with the Tennessee Public Charter Schools Act of 2002 (Tennessee Code Annotated § 49-13-101 et. seq.), as amended, restated or replaced from time to time (the "Charter Act") and the requirements of the Metropolitan Board of Public Education for Nashville and Davidson County (the "Metro School Board"). The Corporation is organized to engage in any activity, and to exercise any and all powers, rights and privileges, afforded a not-for-profit corporation under the Tennessee Nonprofit Corporation Act, as amended from time to time (the "Act"). The Corporation may engage in all activities proper under applicable law, provided such activities are not inconsistent with the Act, the By-laws, the Charter Act, or the requirements of the Metro School Board. The managing of the business and regulation of Corporation affairs shall be consistent with the By-laws.

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; provided, however, that the Corporation shall not carry on any other activities not permitted to be carried on by any of the following: (a) a corporation exempt from federal income tax under Section 501(c)(3) of the code, or any corresponding provision of any future federal tax laws; (b) a corporation to which contributions are deductible under Sections 170(c)(2), 2055(a), and 2522(a) of the Code, or any corresponding provisions of any future federal tax laws; or (c) a nonprofit corporation organized under the laws of the State of Tennessee pursuant to the Act or the Charter Act.

IX.
BOARD OF DIRECTORS

The affairs of the Corporation shall be supervised by its Board of Directors, whose members shall act as the directors of the Corporation, and by such officers, as shall be described in the By-Laws of the Corporation and elected by the Board of Directors.

X.
PROHIBITED TRANSACTIONS

No part of the net earnings of the Corporation shall inure to the benefit of, or be distributable to, its directors, officers or other private persons, except that the Corporation shall

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TERRY HARGRETT
SECRETARY OF STATE

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be authorized and empowered to pay reasonable compensation for services rendered on its behalf, and to make payments and distributions in furtherance of the purposes set forth in Article XII hereof. No substantial 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, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office. Notwithstanding any other provision of these Articles, the Corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3) of the Code, or any corresponding provision of any future federal tax laws, or (b) by a corporation to which contributions are deductible under Section 170(c)(2) of the Code, or any corresponding provisions of any future federal tax laws.

The Corporation shall not engage in any act of self-dealing as defined in Section 4943(d) of the Code, or any corresponding provision of any future federal tax laws. The Corporation shall not retain any excess business holdings as defined in Section 4943(c) of the Code, or any corresponding provision of any future federal tax laws. The Corporation shall not make any investments in a manner that would subject it to tax under Section 4944 of the Code, or any corresponding provision of any future federal tax laws. The Corporation shall not make any taxable expenditures as defined in Section 4945(d) of the Code, or any corresponding provisions of any future federal tax laws.

XI.

DISTRIBUTIONS ON DISSOLUTION

Upon the dissolution of the Corporation, 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 to one or more organizations which qualify as exempt organizations under Section 501(c)(3) of the Code for exclusively public purposes and whose purpose is similar to those of the Corporation. 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 to such organization or organizations which are organized and operated exclusively for such purposes, as such court shall determine.

XII.

INDEMNIFICATION AND ADVANCEMENT OF EXPENSES

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 paragraph 1 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, or 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

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JEFFREY H. HARRIS
SECRETARY OF STATE

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 conduct of the director or officer with respect to an employee benefit plan for a purpose he or she reasonably believed to be in the interest of the participants in, and beneficiaries of, the plan shall be conduct that satisfies the requirements that such person's conduct was at least not opposed to the best interests of the Corporation. 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.

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 paragraph 2 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, or legal representatives, to the same extent as set forth in paragraph 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 subparagraph 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 its laws, by contract, or by general or specific action of the Board of Directors.

3. Non-Exclusive Application. The rights to indemnification and advancement of expenses set forth in paragraphs 1 and 2 above are contractual between the Corporation and the person being indemnified, and his or her heirs, executors, administrators, or 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 law, by this Charter, by a resolution of the Board of Directors, by the By-laws of the Corporation, 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

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of indemnification and advancement of expenses are hereby specifically authorized. The rights of indemnification and advancement of expenses set forth in this Article shall also apply, as appropriate, to any person who was an officer, director, employee or agent (or any such person's heirs, executors, administrators, or legal representatives) of any association, corporation, partnership or trust which was a predecessor to this Corporation, and to any officer, director, employee or agent of this Corporation (or any such person's heirs, executors, administrators, or legal representatives) who is serving or served in any capacity for another association, corporation, partnership or trust at the request of this Corporation.

4. Non-Limiting Application. The provisions of this Article XII 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 persons' 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.

5. Prohibited Indemnification. Notwithstanding any other provision of this Article XII, the Corporation shall not indemnify or advance expenses to or on behalf of any director, officer, employee or agent of the Corporation, or any such person's heirs, executors or administrators:

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.

6. Repeal or Modification Not Retroactive. No repeal or modification of the provisions of this Article XII, 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.

XIII.

LIMITED PERSONAL LIABILITY OF DIRECTORS

No person who is or was a director of the Corporation, nor such person's heirs, executors, administrators, or legal representatives (collectively referred to as a "director"), shall be personally liable to the Corporation for monetary damages for breach of fiduciary duty as a director. However, this provision shall not eliminate or limit the liability of a director (a) for any breach of a director's duty of loyalty to the Corporation, (b) for acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of law, or (c) under Section 48-58-304 of the Act. No repeal or modification of the provisions of this Article, either directly

or by the adoption of provisions 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.

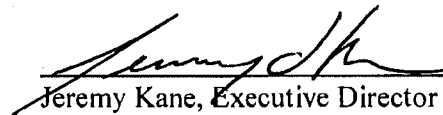
7. This Amended and Restated Charter supersedes the Restated Charter of the Corporation and all prior amendments thereto. The restatement was duly adopted as of May 25, 2010, by the Board of Directors of the Corporation.

8. Pursuant to T.C.A. §48-51-304(b), this restatement is to become effective as of the filing of this restatement with the Secretary of State.

IN WITNESS WHEREOF, the undersigned has executed this Amended and Restated Charter on this 25th day of May, 2010, and attests to the accuracy and completeness of the Restated Charter.

LEAD Public Schools, Inc.

By:


Jeremy Kane, Executive Director

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Tre Hargett
Secretary of State

Division of Business Services
Department of State
State of Tennessee
312 Rosa L. Parks AVE, 6th FL
Nashville, TN 37243-1102

BONE MCALLESTER NORTON PLLC
KIM RAYMOND
511 UNION STREET, SUITE 1600
NASHVILLE, TN 37219

April 12, 2017

Request Type: Certificate of Existence/Authorization
Request #: 0234549

Issuance Date: 04/12/2017
Copies Requested: 1

Document Receipt

Receipt #: 003318865

Filing Fee: \$20.00

Payment-Credit Card - State Payment Center - CC #: 3699617182

\$20.00

Regarding: LEAD Public Schools, Inc.

Filing Type: Nonprofit Corporation - Domestic

Formation/Qualification Date: 03/03/2004

Status: Active

Duration Term: Perpetual

Business County: DAVIDSON COUNTY

Control #: 488781

Date Formed: 03/03/2004

Formation Locale: TENNESSEE

Inactive Date:

CERTIFICATE OF EXISTENCE

I, Tre Hargett, Secretary of State of the State of Tennessee, do hereby certify that effective as of the issuance date noted above

LEAD Public Schools, Inc.

* is a Corporation duly incorporated under the law of this State with a date of incorporation and duration as given above;

* has paid all fees, taxes and penalties owed to this State (as reflected in the records of the Secretary of State and the Department of Revenue) which affect the existence/authorization of the business;

* has not filed the most recent annual report required with this office;

* has appointed a registered agent and registered office in this State;

* has not filed Articles of Dissolution or Articles of Termination. A decree of judicial dissolution has not been filed.

Tre Hargett
Secretary of State

Processed By: Cert Web User

Verification #: 021979232



STATE OF TENNESSEE
Tre Hargett, Secretary of State
Division of Business Services
William R. Snodgrass Tower
312 Rosa L. Parks AVE, 6th FL
Nashville, TN 37243-1102

Filing Information

Name: **LEAD Public Schools, Inc.**

General Information

Control # :	488781	Formation Locale:	Davidson County
Filing Type:	Corporation Non-Profit - Domestic	Date Formed:	03/03/2004
Filing Date:	03/03/2004 9:28 AM	Fiscal Year Close	12
Status:	Active		
Duration Term:	Perpetual		
Public/Mutual Benefit:	Public		

Registered Agent Address

JEREMY D KANE
1704 HEIMAN AVE
NASHVILLE, TN 37208

Principal Address

1704 HEIMAN AVE
NASHVILLE, TN 37208

The following document(s) was/were filed in this office on the date(s) indicated below:

Date Filed	Filing Description	Image #
06/29/2010	Amended and Restated Formation Documents Filing Name Changed From: LEAD ACADEMY To: LEAD Public Schools, Inc.	6739-0748
04/08/2010	2009 Annual Report	6704-0206
09/11/2009	Restated Formation Documents	6594-1561
02/05/2009	2008 Annual Report	6440-1162
05/02/2008	2007 Annual Report Principal Address Changed Registered Agent Physical Address Changed	6309-1321
04/08/2008	Administrative Amendment Mail Address Changed	6284-2594
04/04/2007	2006 Annual Report	6029-1403
08/02/2006	Articles of Amendment Name Changed	5840-0059
05/09/2006	2005 Annual Report	5786-1727
03/03/2004	Initial Filing	5376-2208

Active Assumed Names (if any)

Date

Expires

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 24 2007

LEAD ACADEMY
C/O JEREMY D KANE
5202 IDAHO AVE
NASHVILLE, TN 37209-3307

Employer Identification Number:
20-2526508
DLN:
406289069
Contact Person:
JOYCE DARBY ID# 95011
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
170(b)(1)(A)(ii)
Form 990 Required:
Yes
Effective Date of Exemption:
March 3, 2005
Contribution Deductibility:
Yes

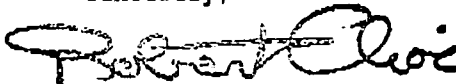
Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Robert Choi
Director, Exempt Organizations
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)

Letter 947 (DO/CG)

AMENDED AND RESTATED
BY-LAWS
OF
LEAD PUBLIC SCHOOLS, INC.

Adopted: October 1, 2019

ARTICLE I.
IDENTIFICATION

Section 1. Name. The name of the corporation shall be LEAD Public Schools, Inc. (the “Corporation”), which is formed exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the “Code”).

Section 2. Offices. The executive offices of the Corporation shall be in Davidson County, Tennessee, but the Corporation may have other offices at such places as the Board of Directors may from time to time decide or as the business of the Corporation may require.

Section 3. Seal. The corporation shall have no seal.

Section 4. Fiscal Year. The fiscal year of the Corporation shall begin on July 1 and end on June 30 of the next calendar year, but the Board of Directors may from time to time change the fiscal year of the Corporation.

ARTICLE II.
OBJECTIVES AND PURPOSES

The Corporation is organized exclusively for charitable and educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the “Code”). Specifically, the Corporation shall, acting as a holding company, establish and operate, through wholly-owned subsidiaries, one or more Charter Schools in accordance with the Tennessee Public Charter Schools Act of 2002 (Tennessee Code Annotated § 49-13-101 et. seq.), as amended, restated or replaced from time to time (the “Charter Act”) and the requirements of the Metropolitan Board of Public Education for Nashville and Davidson County (the “Metro School Board”), the Tennessee Achievement School District (the “ASD”), and any future charter school authorizers (collectively, the “Charter Authorizers”). The Corporation is organized to engage in any activity, and to exercise any and all powers, rights and privileges, afforded a not-for-profit corporation under the Tennessee Nonprofit Corporation Act, as amended from time to time (the “Act”). The Corporation may engage in all activities proper under applicable law, provided such activities are not inconsistent with these

Act, the By-laws, the Charter Act, or the requirements of the Charter Authorizers. The managing of the business and regulation of Corporation affairs shall be consistent with these By-laws.

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; provided, however, that the Corporation shall not carry on any other activities not permitted to be carried on by any of the following: (a) a corporation exempt from federal income tax under Section 501(c)(3) of the code, or any corresponding provision of any future federal tax laws; (b) a corporation to which contributions are deductible under Sections 170(c)(2), 2055(a), and 2522(a) of the Code, or any corresponding provisions of any future federal tax laws; or (c) a nonprofit corporation organized under the laws of the State of Tennessee pursuant to the Act or the Charter Act. The Corporation shall not discriminate with respect to admissions to its Charter School(s) on the basis of race, creed, color, national origin, religion, ancestry, or the need for special education services as set forth in the Charter Act. Further, the Corporation shall insure that its Charter School(s) is non-sectarian and non-religious in its curriculum, programs, admission policies, employment practices, governance, and all other operations.

ARTICLE III.

NO MEMBERS

The Corporation shall not have members.

ARTICLE IV.

DIRECTOR/NOMINATING COMMITTEE

A Director/Nominating Committee consisting of (i) the Chairman of the Board of Directors, and (ii) two additional Directors, who shall be nominated by the Chairman and approved by a majority vote of the Board of Directors, shall serve as the Nominating Committee of Directors for the Corporation. The Chief Executive Officer of the Corporation shall also serve as an *ex officio* member of the Director/Nominating Committee. At each Annual Meeting of the Board of Directors of the Corporation, the Director/Nominating Committee shall present the Board of Directors with a single slate of nominees for election to the Board of Directors, which slate of nominees shall be approved or disapproved by a Majority Vote (as defined in Article V Section 4) of the Board of Directors. In addition, the Director/Nominating Committee shall present the Board of Directors with a single slate of nominees for Officers of the Corporation, with such slate of Officers to be approved or disapproved by a Majority Vote of the Board of Directors. In each instance, the Director/Nominating Committee shall establish the slate of Directors and slate of Officers by a Majority Vote of the Committee.

ARTICLE V.

DIRECTORS

Section 1. General Powers; Number. The business and affairs of the Corporation shall be managed and controlled by its Board of Directors, 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, its Charter, these By-Laws, the Charter Law, or the requirements of the Charter Authorizers. There shall at all times be at least five (5), but not more than twenty (20) Directors. However, the number of Directors may be increased or decreased from time to time by amendment to these By-Laws.

Section 2. Composition of the Board of Directors; Term. The Board of Directors shall be composed of a minimum of five (5) Directors, and a maximum of twenty (20) Directors. Each Director shall serve a three-year term, with the term of approximately one-third of the Board to be scheduled to expire each year. Directors shall be entitled to serve two (2) consecutive three-year terms; and, after a lapse of at least one year, any Director shall be entitled to be reelected for an additional term(s) (subject to the limitation of two (2) consecutive terms). Directors will be elected at the Annual Meeting of the Corporation from a single slate presented by the Director/Nominating Committee. The Board of Directors shall be self-perpetuating. In addition to the elected Directors, the Chief Executive Officer of the Corporation shall also serve as an *ex officio*, but non-voting, member of the Board of Directors.

Section 3. Meetings. Regular meetings of the Board of Directors shall be held quarterly or upon call at any time by the Chairman of the Board, Chief Executive Officer or by any two (2) Directors on at least five (5) days' prior written notice forwarded to the entire Board by the Secretary of the Corporation. Notice of any such meeting may be waived by the person or persons entitled thereto by signing a written waiver of notice at any time before or after the meeting is completed. Attendance of a Director at a meeting shall constitute a waiver of notice thereof unless such attendance is for the express purpose of objecting to such meeting. Any meeting of the Board of Directors may be held within or without the State of Tennessee at such place as may be determined by the person or persons calling the meeting. Any Director may participate in a meeting of the Board of Directors (or of any committee of the Board of Directors) 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.

Section 4. Quorum; Voting. A majority of the Directors then in office shall constitute a quorum for the transaction of business; and the vote or action of a majority of the Directors present at any meeting at which a quorum exists (a "Majority Vote") shall decide any matter that may come before the meeting and shall be the act of the Board unless otherwise specifically required by law or by express provision of the Charter or By-Laws of the Corporation. Directors absent from any meeting shall be permitted to vote at such meeting by written proxies. The CEO, as an *ex-officio* member of the Board, shall not be entitled to vote, nor shall his/her presence at a meeting count towards the calculation of a quorum.

Section 5. Vacancies. Vacancies in the Board of Directors occurring for any reason, including an increase in the number of Directors or the resignation or removal of any Director, may be filled by a Majority Vote of the Directors for a nominee proposed by the Director/Nominating Committee. A Director elected to fill any vacancy shall hold office for the remainder of the term of the Director that he or she is replacing.

Section 6. Removal. Upon an affirmative majority vote of the entire Board of Directors any Director may be removed from office, with or without cause.

Section 7. Compensation. Directors shall not receive any compensation for their services, but by resolution of the Board of Directors may be reimbursed for their expenses incurred in attending the meetings of the Board or in performing official functions of the Corporation.

Section 8. Disqualification of a Director. No person who has been convicted of a felony or other criminal offense involving dishonesty, fraud, or moral turpitude shall be elected as a Director of the Corporation; and any existing Director of the Corporation who is convicted of a felony or other criminal offense involving dishonesty, fraud, or moral turpitude shall automatically be removed from office, without the need for any further action by the Board of Directors.

Section 9. Delegation of Operational Duties. Notwithstanding the fact that the Board of Directors is responsible for the business and affairs of the Corporation, the Board of Directors is entitled to delegate the responsibility for the day-to-day operations of the Corporation's Charter School(s) to the Chief Executive Officer and Officers of the Corporation (or the Principal or Officers of any subsidiary of the Corporation), subject to the continuing oversight and direction of the Board.

ARTICLE VI.

OFFICERS

Section 1. Designation. The principal Officers of the Corporation shall be the Chairman of the Board, the Chief Executive Officer, a Secretary, a Treasurer and any other Officers deemed appropriate by the Board of Directors. Any two (2) or more of such offices may be held by the same person except the offices of Chief Executive Officer and Secretary.

Section 2. Chairman of the Board. The Chairman of the Board (also known as the "Chairman") shall preside at all meetings of the Board of Directors and shall act as the principal liaison between the Board and the Chief Executive Officer and other Officers. The Chairman shall serve as a member of the Director/Nominating Committee, with the additional responsibility of (i) nominating the other two Directors to serve on the Director/Nominating Committee (subject to Board approval), and (ii) presiding over each committee meeting of the Director/Nominating Committee. The Chairman shall be charged with the responsibility of appointing, with the assistance of the Chief Executive Officer, the members of each standing committee of the Board. The Chairman shall be entitled to serve on any standing committee of the Board. The Chairman shall have such other powers and perform such other duties as may be assigned by the Board.

Section 3. Chief Executive Officer. The Chief Executive Officer (also known as the "President") shall be the chief executive officer of the Corporation and shall exercise all the powers and duties customarily exercised by the chief executive officer of business corporations. He/She shall have general supervision of the business and property of the Corporation; and he/she may appoint agents and employees of the Corporation, other than the Officers elected or appointed by the Board, subject to the approval of the Board. The Chief Executive Officer shall be responsible for the day-to-

day operations of the Corporation's Charter School(s) with the ability to hire and fire all Charter School personnel. He/She shall perform such other duties as may from time to time be prescribed by the Board. The Chief Executive Officer shall be an *ex officio* member of the Board of Directors, as well as all standing committees of the Board. At each meeting of the Board of Directors, the Chief Executive Officer shall report on the operations of the Charter School(s).

Section 4. Secretary. The Secretary shall keep the minutes of all meetings of the Board of Directors in appropriate books and shall attend to the giving of all notices for the Corporation. He/She shall have charge of the books and records of the Corporation and such other books and papers as the Board may direct, and he/she shall in general perform all duties incident to the office of Secretary of the Corporation. He/She shall perform such other duties as may from time to time be prescribed by the Board.

Section 5. Treasurer. The Treasurer (also known as the "Chief Financial Officer") shall be responsible for the overall care and custody of the funds, securities and finances of the Corporation, and he/she shall in general perform all duties incident to the office of Treasurer of the Corporation. He/She shall perform such other duties as may from time to time be prescribed by the Board. The Treasurer shall be responsible for maintaining the financial records of the Corporation and any audits of the Corporation's financial statements. The Treasurer shall be entitled to delegate certain responsibilities to an assistant treasurer or the Corporation's comptroller, if any.

Section 6. Other Officers. The Board of Directors may appoint, or may authorize the President to appoint, one or more Vice Presidents, an Assistant Secretary, an Assistant Treasurer, Chief Academic Officer and such other Officers as the Board may from time to time decide, who shall have such authority and perform such duties as may from time to time be prescribed by the Board or designated by the President.

Section 7. Election and Term of Office. The Officers shall be elected or appointed at the Annual Meeting of the Board of Directors, provided that any vacancy or newly created office may be filled at a special meeting of the Board, with such Officers to be elected from a single slate of Officers nominated by the Director/Nominating Committee and approved by Majority Vote of the Board of Directors (except in the case of a vacancy, in which case only a single Officer will be elected by the Board of Directors). The Officers shall hold office at the pleasure of the Board, and any Officer may be removed, with or without cause, at any time by a majority vote of the entire Board of Directors. Unless otherwise determined by the Board, each Officer shall hold office until the next Annual Meeting of the Board and thereafter until his/her successor has been elected or appointed and qualified.

ARTICLE VII

STANDING COMMITTEES

Section 1. Designation. The committees hereinafter designated shall be Standing Committees of the Board; provided however, that if deemed advisable by the Board, certain committees may be combined and/or new committees may be established. The members of each committee, along with such committee's Chairman, shall be appointed by the Chairman of the Board

with the assistance of the Chief Executive Officer. Each committee shall have at least two (2) members, with the Chief Executive Officer serving as an *ex officio* member of each committee. Persons, who are not Directors of the Corporation, may serve on any Standing Committee.

Section 2. Meetings. Meetings of any committee may be requested by the Chief Executive Officer or the Board but shall be called by the Chairman or two members of the committee by giving written notice at least five (5) days prior to the date of the meeting with the notice to contain the time and place of the meeting.

Section 3. Quorum. The majority of the committee shall be necessary to constitute a quorum for the transaction of business, and the act of the majority of the members present at a meeting at which a quorum is present shall be the act of the committee.

Section 4. Powers and Duties. The powers and duties of each designated Standing Committee are as follows:

(a) Finance and Audit. This committee shall make reports and recommendations to the Board concerning all policies relating to the financial operation of the Corporation (and its subsidiaries) including the current operational budget, annual audit, and other financial endeavors. It shall work with the Chief Executive Officer and Chief Financial Officer in developing the budget (and the budgets for the Corporation's subsidiaries); shall hear the proposals of the Chief Executive Officer for salary increases; and shall study the benefits of the faculty, staff and Chief Executive Officer and it is also responsible for the insurance program of the Corporation and for the investment of the Corporation's funds.

(b) Marketing and Development. This committee shall prepare, organize and administer such fund raising campaigns, both general and special, as the Board deems necessary for the continued operation, growth, and development of the Corporation's Charter School(s). Further, the Development Committee shall work in conjunction with the Chief Executive Officer in the application for, and compliance with, any grants available to the Corporation.

(c) Academic Affairs. This committee shall make reports and recommendations to the Board of means and methods for the improvement of the education being provided by the Corporation's Charter School(s) (including under the term "education" every aspect of the school's program) and shall keep the actual curriculum under review.

Section 5. Director Information Requests. Each Director shall be entitled to receive information regarding the Corporation by requesting from the Chairman of the appropriate standing committee the applicable information, and the Chairman shall then obtain such information from the appropriate Officer of the Corporation and provide such information to the requesting Director.

ARTICLE VIII.

SPECIAL CORPORATE ACTS

Section 1. Contracts. The Board of Directors may authorize any Officer or agent of the Corporation to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation and such authority may be general or confined to specific instances.

Section 2. Checks, Drafts, etc. All checks, drafts or other orders for the payments of money, notes or other evidence of indebtedness issued in the name of the Corporation shall be signed by such Officer or agent of the Corporation and in such manner as shall from time to time be determined by the Board of Directors.

Section 3. Deposits. All funds of the Corporation shall be deposited to the credit of the Corporation in such banks, trust companies, brokerage accounts, investment managers, or other depositories as the Board of Directors may select.

Section 4. Gifts and Contributions. The Board of Directors may accept on behalf of the Corporation any contribution, gift, bequest or devise for the general purposes or for any special purpose of the Corporation.

Section 5. Investments. The Board of Directors, or any other Officer or agent empowered by them, shall have authority to invest and reinvest funds of the Corporation in such manner and in such property or securities as they shall approve, and to change investments hereof from time to time as they may deem expedient.

Section 6. Fiscal Agents. The Board of Directors may appoint and authorize fiscal agents to exercise any duty or function as they deem expedient, providing all transactions involving investment shall be approved by the Board of Directors before being made.

ARTICLE IX.

BOOKS AND RECORDS

The Corporation shall keep correct and complete books and records of accounts and shall also keep minutes of the proceedings of its Board of Directors, and shall keep at the registered or principal office a record giving the names and addresses of the Directors. All books and records of the Corporation may be inspected by any Director, or his agent or attorney, for any purpose at any reasonable time. There shall be an annual audit of the financial records of the Corporation in such manner as directed by the Directors.

ARTICLE X.

1. INDEMNIFICATION AND ADVANCEMENT OF EXPENSES

1. Section 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 1 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, or 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:

1. (a) The Proceeding was instituted by reason of the fact that such person is or was a Director or Officer of the Corporation; and

2. (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 conduct of the Director or Officer with respect to an employee benefit plan for a purpose he or she reasonably believed to be in the interest of the participants in, and beneficiaries of, the plan shall be conduct that satisfies the requirements that such person's conduct was at least not opposed to the best interests of the Corporation. 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.

2. **Section 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 2 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, or legal representatives, to the same extent as set forth in Section 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 Section 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 its by laws, by contract, or by general or specific action of the Board of Directors.

3. **Section 3. Non-Exclusive Application.** The rights to indemnification and advancement of expenses set forth in Sections 1 and 2 above are contractual between the Corporation and the person being indemnified, and his or her heirs, executors, administrators, or 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 law, by this Charter, by a resolution of the Board of Directors, by the By-laws of the Corporation, 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. The rights of indemnification and advancement of expenses set forth in this Article shall also apply, as appropriate, to any person who was an Officer, Director, employee or agent (or any such person's heirs, executors, administrators, or legal representatives) of any association, corporation, partnership or trust which was a predecessor to this Corporation, and to any Officer, Director, employee or agent of this Corporation (or any such person's heirs, executors, administrators, or legal representatives) who is serving or served in any capacity for another association, corporation, partnership or trust at the request of this Corporation.

4. **Section 4. Non-Limiting Application.** The provisions of this Article X 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 persons' 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.

5. **Section 5. Prohibited Indemnification.** Notwithstanding any other provision of this Article X, the Corporation shall not indemnify or advance expenses to or on behalf of any Director, Officer, employee or agent of the Corporation, or any such person's heirs, executors or administrators:

1. (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

2. (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

3. (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.

6. **Section 6. Repeal or Modification Not Retroactive.** No repeal or modification of the provisions of this Article X, 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.

CONFLICTS OF INTEREST

Section 1. Purposes. The purpose of the conflicts of interest policy is to protect the Corporation when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an Officer or Director of the Corporation or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.

Section 2. Definitions.

(a) Interested Person. Any Director, Officer, or member of a Committee with Board of Director delegated powers who has a direct or indirect financial interest, as defined below, is an interested person.

(b) Financial Interest. A person has a financial interest if the person has, directly, or indirectly, through business, investment, or family:

(1) An ownership or investment interest in any entity with which the Corporation has a transaction,

(2) A compensation arrangement with the Corporation or with any entity or individual with which the Corporation has a transaction or arrangement, or

(3) A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Corporation is negotiating a transaction or arrangement.

Compensation includes direct or indirect remuneration as well as gifts or favors that are not insubstantial.

A financial interest is not necessarily a conflict of interest. Under Section 3(b), a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

Section 3. Procedures

(a) Duty to Disclose. In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and disclose all material facts to the Directors and members of Committees considering the proposed transaction or arrangement.

(b) Determining Whether a Conflict of Interest Exists. After disclosure of the financial interest and all material facts, and after any discussion with the interested person, s/he shall leave the Board or Committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining Board or Committee members shall decide if a conflict of interest exists.

(c) Procedures for Addressing the Conflict of Interest.

(1) An interested person may make a presentation at the Board or Committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

(2) The chairperson of the Board or Committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

(3) After exercising due diligence, the Board or Committee shall determine whether the Corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

(4) If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the Board or Committee shall determine by a majority vote of the disinterested Board or Committee members whether the transaction or arrangement is in the Corporation's best interest, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

(d) Violations of the Conflicts of Interest Policy.

(1) If the Board or Committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

(2) If, after hearing the member's response and after making further investigation as warranted by the circumstances, the Board or Committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

ARTICLE XII.

AMENDMENT

The Directors of the Corporation may adopt new By-Laws and may amend or repeal any or all of these By-laws at any Annual or other meeting of the Board of Directors at which a quorum is present, by a majority vote of the entire Board, provided that the proposed amendment shall have been included in the notice of the meeting. The Secretary shall compile and maintain a list of amendments to these By-Laws, accompanied by the date of each amendment.

EXECUTIVE SUMMARY

Strategic, well-connected Managing Director with 20+ years of experience in defining and executing strategies around financial management, contract management, technology development, alliance management, organizational design, performance management, and compliance. A results-oriented executive with deep expertise in technology strategy and operations, having built and led teams with responsibility over multi-million dollar projects and cost savings initiatives. Recognized for collaborative leadership style, proactive approach, and keen ability to effectively translate complex operational concepts into tangible action plans. A proven leader with a strong executive presence, capable of blending big-picture viewpoints with tactical considerations to inspire, build trust, and achieve value against opportunities.

PROFESSIONAL EXPERIENCE

DELOITTE, MANAGING DIRECTOR – WORKPLACE EXPERIENCE

2019 - present

Build and lead the digital transformation and strategic business planning organization, which formulates and executes Deloitte's Workplace Experience digital strategies for 100,000+ practitioners. Set and execute the vision for a modern digital enterprise offering enhanced data and analytics, real-time transaction processing, a single view of our customers, enhanced mobile experiences, and faster product launches. Drive technology investments and transform the practitioner's in-office experience. Design and lead vendor sourcing and procurement strategies, including gap analysis, sourcing, build vs buy, ROI, and vendor performance management. Spearhead the technology enablement of the pandemic return to work strategies including real estate management, health assessments, visitor management, travel approvals, and client site assessments.

Results:

- Built and led team responsible for the design, configuration, and implementation of 60+ digital technology solutions for Workplace Experience, enhancing the customer experience while driving the development agenda.
- In response to the Covid-19 pandemic, planned and orchestrated the successful launch of digital technologies to allow practitioners to attest to current health and permit access to Deloitte's work environment (either in office, at client sites, while traveling, or at remote meeting locations). Increased compliance with Health Declarations to an average of 95%, lowering risks to Deloitte. Allowed safer access to Deloitte's work environment to over 100,000 practitioners and visitors in the US and India.
- Established a digital technology pipeline and roadmap of over 75 new productivity, experience, and cost improvement initiatives (generating over \$5MM in current and future savings). Fast-tracked implementation of 20% of those projects to current fiscal year.
- Led sourcing strategy for flagship programs (i.e., Pandemic Return to Work, Corporate Ticket Management, Digital Mail, Meeting Management, Resource Scheduling, and Badging).
- Modernized our Workplace Experience technology portfolio by retiring 12 legacy applications.
- Enhanced leadership visibility to the customer experience and health of the organization by leading the development of a comprehensive digital performance dashboard across the entire organization, significantly enhancing our ability to make decisions faster and with better information.

- Improved project predictability, enhanced team collaboration, and increased application quality and customer satisfaction by partnering with the Information Technology Services team on the implementation of the Agile framework across the organization.
- Spearheaded the development of the Digital Mindset program to mine the collective intelligence of the 3,000+ Workplace Experience practitioners (launching soon)

DELOITTE, MANAGING DIRECTOR – FINANCE

2015 - 2019

Led the massive data conversion effort to the new SWIFT SAP S4 system. Built a team to execute the data conversion activities. Developed strategy and drove the conversion of over 42 million master and transactional data records (including project data, financial history, vendor payments, client billing and collections data, client and vendor information, HR data, and reporting data) to the new SAP financial system.

Results:

- Built and led a team of 70+ software developers, finance professionals, and consultants through significant data conversion activities, including software development, training, testing, cutover, and validation.
- Negotiated multi-million dollar agreement for data migration software and consulting services for the SWIFT SAP S4 program.
- Planned and directed critical data conversion activities (extraction, filtering, cleansing, transformation, validation, and reconciliation) to launch the new financial system
- Set standards and business rules for Master Data Governance elements to ensure data quality and consistency
- Developed, piloted, and executed 32 independent data conversion programs for the new system implementation.
- Led successful Executive Stakeholder Data Validation project
- Successfully converted and validated 100% of the 42 million records over the small implementation window

DELOITTE, MANAGING DIRECTOR – OFFICE OF THE GLOBAL CEO

2012 - 2015

Led office of the CEO projects, employee engagement initiatives, data analytics, and strategy development efforts to help the Office of the CEO and Executive achieve their vision and strategic priorities. Crafted integrated execution plans for the new Global strategy for future growth and expansion. Defined Global CEO goals and structured them around a performance framework tightly aligned with the new strategy. Introduced and launched a fourth focus area to the employee engagement program – connecting with community – that increased DTTL involvement in community activities through education and awareness. Executed new programs that redefined and strengthened our interactions and connectivity across the organization. Top-level advisor to Global CEO and the Executive.

DELOITTE, MANAGING DIRECTOR - GLOBAL AND US TECHNOLOGY SERVICES

2010 - 2012

Built the Global and US IT Business Operations practice for the \$1.0 billion, 2,000+ person US and Global technology organizations. Served as Managing Director with leadership responsibility over 6 major areas

including Finance, Strategy, Communications, Procurement, Talent, and DEI. Created and delivered solutions for organization design and governance, business transformation and change, operations redesign, process improvement, and financial management.

Results:

- Built and led strong leadership teams within both the US and Global IT Business Operations organizations, developing team members for advancement and success.
- Identified and set the annual US and Global IT Strategy, impacting over 190,000+ practitioners.
- Restructured the finance and operations discipline and processes. Drove performance turnaround, decreased Global IT cost as a percentage of revenue from 5.5% to 3.9%, eliminated \$30+ million in Technology spend and delivered predictable, on-plan performance annually.
- Spearheaded cost leadership efforts using various strategies, including global sourcing, worldwide procurement, defined standards, and an efficient operating model.
- Led Global IT procurement with operational responsibility for the negotiation strategy and management of large global software vendors such as Microsoft, McAfee, and IBM encompassing over 80 countries.
- Chief liaison for US IT procurement with responsibility for \$100+ million in vendor spend.
- Developed and delivered next-generation communications strategies for 300+ applications and services. Built and led a world-class organization to execute the communications strategies.
- Drove the expansion of our IT workforce in India, resulting in 33% of our products and services being delivered in a lower-cost model.
- Developed and negotiated funding for the expansion of Technology services to support Deloitte acquisitions, including one of the largest (\$23 million IT financial plan).
- Significantly increased underrepresented talent recruiting and representation by launching the Technology Intern program.
- Enhanced and revitalized the way IT added value to 50,000+ practitioners through the launch of the Client Service Excellence program, one of the critical milestones in building better relationships with our customers and laying the foundation for a worldwide technology model
- Transitioned financial management process from a cost center driven approach to a project-based process. Expanded financial accountability to the management team through managed objectives and metrics within each business unit, resulting in on-budget performance each fiscal year.

EARLY CAREER EXPERIENCE (1994 – 2010)

National Business Operations Leader – Deloitte US Information Technology Services

National Controller – Deloitte US Finance

Global IT Operation Manager – Deloitte Consulting

Analyst – Deloitte Consulting

Accounts Payable Analyst – United Parcel Service

EDUCATION/ASSOCIATIONS

Doctor of Business Administration – Lynchburg, VA (Currently Pursuing)

Master of Business Administration - Nashville, TN (2003)

Bachelor of Science – Biology - Nashville, TN (1998)

YWCA of Middle TN – Board Member (Development Committee)

Lead Public Schools – Board Member (Finance Committee)

Ascend Federal Credit Union – Volunteer Board Member

Second Harvest Food Bank – Volunteer

Jonathan Nathaniel Dyke

211 Lynnwood Boulevard Nashville, TN 37205
202.374.7777 jonathan.dyke@hobanroadventures.com

Summary:

Digital marketing and payments expert with more than 25 years of experience and a track record for building successful organizations. A relentless entrepreneur and a strong leader with deep startup and large company corporate experience. Excellent communicator and team builder who creates a fun and vibrant workplace that attracts and energizes top talent. Prior teaching experience includes serving as an instructor, coach, and faculty member for internal professional develop and skill enhancement programs for emerging leaders across various corporate environments. Jonathan is a frequent speaker at industry events and conferences on a range of topics from payments to leadership.

Jonathan is currently founder and Chief Executive Officer of FutureSelf Network based in Nashville. As founder, he developed the idea and created the business model for serving DEI leaders across global 1000 companies. FutureSelf Network (FSN) is an invitation-only global network of leading organizations focused on executing diversity, equity and inclusion (DEI) initiatives. We identify management strategy, processes, tools and frameworks that will allow our members to avoid reinventing the wheel in addressing problems they share in common with their peers. Our goal is to support our member community with action-oriented deliverables, executive networking, and planning tools that drive their DEI strategy forward.

Prior to FutureSelfNetwork, Jonathan was Co-founder and Chief Operating Officer of Spring Marketplace, Inc., the leader in leveraging payment transaction data to connect on-line advertising to in-store revenue outcomes. Through partnerships with the payment networks (Visa, MC, Amex), Spring manages rewards and loyalty programs for large shopping mall operators (Simon, Taubman, Macerich, Starwood, Preit and GGP) and enterprise retail brands (Nordstrom, Gap, Untuckit, etc.). The Spring platform provides the retail ecosystem with omni-channel customer analytics, mobile marketing, and engagement solutions delivering millions of dollars in incremental revenue and profit via solutions not available elsewhere in the market.

Prior to Spring, Jonathan served as Chief Operating Officer for edō Interactive where he was instrumental in defining a new advertising category that is now called "card-linked offers". As COO, he was responsible for building a team of over 100 people in Nashville, Chicago, and San Francisco. He was responsible for the day-to-day execution of edō's strategy managing sales to merchants (enterprise and SMB), sales to financial institutions (top 20 issuers and processors), technology, marketing and product development.

Prior to edō, Jonathan served as CTO/CIO for The Corporate Executive Board (NASDAQ: EXBD), a provider of best practices research and quantitative analysis focusing on corporate strategy, operations and general management issues. As CTO/CIO, he managed a team 300+ professionals globally, supporting CEB's business operations and interactive product development initiatives. Prior to his role as CTO/CIO, Jonathan was Chief of Staff to the Chairman/CEO where he was responsible for planning the firm's IPO as well as for budget creation and management, IT strategy and new product development. Prior to CEB, Jonathan worked in sales and product development at ERIIS, a mapping software company.

Experience:

Vanderbilt University, Nashville, TN

August 2021 — Current

Lecturer in Business Studies. Teaching a course of the science and art of Negotiations in the undergraduate Business minor in the College of Arts and Science.

Ideascape Global, LLC Nashville, TN

January 2020 — Current

Ideascape is an invitation-only global network of leading organizations focused on executing diversity, equity and inclusion (DEI) initiatives. We identify management strategy, processes, tools and frameworks that will allow our members to avoid reinventing the wheel in addressing problems they share in common with their peers. Our goal is to support our member community with action-oriented deliverables, executive networking, and planning tools that drive their DEI strategy forward.

Ideascape combines shared cost research economics and a membership-based client model, allowing us to provide data and insight

at the quality standard of the premier strategy and DEI consulting firms but at a fraction of the cost. This model also creates a closed loop for research: our members develop a list of their most pressing DEI challenges and that serves as our priorities for the year. We are guided by a strong sense of stewardship for our members' confidences and financial contributions, and we strive in each interaction to achieve a level of service that is unparalleled in their commercial experience.

- Founder and Chief Executive Officer
 - Developed business model from scratch and have built initial team
 - Manage "members" problem solving DEI issues specific to their environment
 - Manage all business development and member engagement activities

FutureSelf Discover, LLC. Nashville, TN

January 2020 — Current

FutureSelf Discover is an inclusive digital community of students exploring and planning their path forward in life. We help students understand educational opportunities, explore possible career paths, and get certified in specific skills that will better prepare them for an income producing job. FSD partners with leading student non-profit organizations like the Boys and Girls club of America in support of their Career and College Readiness programming.

Spring Marketplace, Inc. Chicago, IL

June 2012 -- December 2019

Spring designs and manages mobile rewards and loyalty solutions for large shopping mall operators and retail brands. Leveraging credit/debit card data, Spring offers customers a delightful shopping experience while delivering incremental revenue and powerful customer analytics to the retail ecosystem.

- Co-founder, Chief Operating Officer
 - created and executed the original concepts and the business model for Spring
 - raised over \$20M of venture capital across two rounds from leading national and regional firms
 - negotiated long-term, strategic partnership agreements with the payment networks – Visa, MC. Amex
 - led business development effort to establish and manage long-term strategic partnerships with the largest shopping mall operators in the US – Simon, Macerich, Taubman, Starwood, Preit and GGP.
 - managed marketing, business development and partnership teams

edo Interactive, Inc. Nashville, TN - Chicago, IL

January 2008 -- June 2012

edo is the market leader in connecting online advertising with in-store revenue results. edo provides an easy way to personalize offers and make them automatically available through credit/debit cards and mobile devices. Through partnerships with the largest banks in the US, edo delivers card-linked offers from the top 1000 retail brands that are targeted to customers yielding incremental revenue lift for retailers. edo was the first company to bring this intersection of 'payments & advertising' to market riding a number of marketplace trends including the convergence of digital, personalization and mobile.

- Chief Operating Officer
 - built company from day--one into 100+ team organization in Nashville, Chicago and San Francisco
 - raised over \$30M of venture capital across three rounds from leading national and regional firms
 - managed all aspects of the business; business development, technology, and marketing
 - acquired by Augeo in 2017

Corporate Executive Board (nasdaq: EXBD) Washington, DC

June 1995 – December 2007

Corporate Executive Board (aka CEB) is a best practices and benchmarking membership organization with a membership of more than 10,000 corporate executives across 20 functional areas. CEB was acquired by Gartner in 2017 for \$2.6B.

- Chief Information Technology Officer, Executive Director
 - overall responsibility of global infrastructure and digital product delivery
 - executed annual budget of over \$15MM for technology deliverables
 - designed and executed compliance and "sarbox" protocols across the entire global organization
 - developed and taught leadership training for new managers across the firm

- Managing Director, Technology and Internet Solutions
 - built and managed a team of over 300 technologists maintaining a global infrastructure
 - responsible for new product development; built and managed a web platform of over 60 web sites
 - designed, launched and managed 150 person office in New Delhi, India
 - taught leadership skills for newly hired manager-level team members
- Chief of Staff, Office of the CEO
 - served as “right-hand” to Chairman and CEO managing a portfolio of diverse projects and leadership responsibilities including revenue growth, talent management, product development and investor relations
 - worked with teams across the organization managing internal and external marketing efforts
 - managed all aspects of the very successful February 1999 initial public offering (IPO) on nasdaq (exbd)
- Senior Manager, Sales and Account Management
 - prospected and sold CEB products into senior executives at Global2000 companies
 - consistently over achieved acquisition and contract renewal revenue goals

Education:

Cornell University	2019 — 2020
Diversity and Inclusion Studies Program Certificate	
George Washington University	1998 -- 2000
M.B.A. with concentration in Technology and Marketing	
Vanderbilt University	1989 -- 1993
B.S. Human and Organizational Development, Peabody School of Education	

Community Involvement:

Big Brothers of Nashville	2019 — Current
Serve as a “big” for high school students at metro Nashville public schools	
Ensworth School, Nashville, TN	2012 — 2018
Served as a Board member for six years at Ensworth (K-12) School; led the “Vision Committee” that created and managed the long-term strategic plan for the school.	

Jerome Oglesby

Brentwood, TN | jerome.oglesby@outlook.com | (615) 585-9519 | www.linkedin.com/in/jeromeoglesby



Jerome Oglesby is a globally recognized transformational leader in information technology, IT governance and operations, digital transformation, and cyber security with over 35 years of experience in leading technology mergers, acquisitions, and transitions. Jerome has a highly successful track record in leading large technology transformations, outsourcing and growth strategies for the world's largest airline, telecommunications company, and professional services firm.

Jerome recently served as the Global Chief Technology Officer for Deloitte Touché Tohmatsu Limited, commonly referred to as Deloitte, the world's largest professional services organization, with approximately 350,000 people in more than 150 countries around the world. Jerome held broad technology reach leading over 1,100 employees that supports Deloitte's \$2.4 billion global technology organization. Jerome drove global technology governance, strategy, architecture, engineering, and operations. Jerome exudes passion around leveraging leading-edge technologies across different lines of business and had influence over the global IT landscape of Deloitte and its \$560 million digital transformation to cloud services. Jerome was also an influential leader in Deloitte's \$650 million cyber security transformation and has led previous transformation efforts in disaster recovery and business continuity planning, corporate pandemic planning, and sustainability efforts. Jerome led the Global IT Governance Council that oversees all IT capabilities across participating member firms within Deloitte.

Jerome joined Deloitte in June 2004 as Technology Director of the U.S. member firm and has served as Deputy Chief Information Officer and Chief Technology Officer for Deloitte Services LP. Jerome is known for driving enterprise-wide transformational change and prior to joining Deloitte, he was Executive Director of Information Technology with Cingular Wireless, leading the technology joint venture of SBC Wireless and BellSouth Mobile to become the largest wireless carrier in the United States. Jerome has experience within the airline and travel industry with Sabre Inc., the industry leader in travel and reservations technology and American Airlines, where he led technology outsourcing of major airline operations. Jerome was a key leader in the \$4.3 billion, 25-year contract between US Airways Group Inc. and Sabre Group Holdings, Inc., insourcing US Airways' information technology assets and the \$6.3 billion technology divestiture of Sabre Holdings from American Airlines.

Jerome serves on the board of directors for ScienceLogic, Inc, a privately held automation and machine learning software company, and Orokii, Inc and privately held digital payment processing company. Jerome also serves on several non-profit boards including Nashville based LEAD Charter Schools and member of the Finance Committee; Nashville Innovation Advisory Council; and Tennessee CIO Advisory Board. Jerome previously served on the boards of the Information Technology Senior Management Forum Finance Chair and Secretary; Metro-Chicago YWCA Finance Committee; Urban league of Middle TN Finance Committee; Nashville Technology Council, and Nashville CIO Advisory Board. Jerome previously served as a member of Deloitte's Technology Executive.

Jerome holds a Bachelor of Science degree in Information Systems from The University of Texas Arlington, and a Master's in Business Administration from Lipscomb University. He is also a graduate of the United States Marine Corps Communications Electronics Institute in 29 Palms California.

Ms. Linda C. Pannock, PgMP, PMP
(615) 364-5309 (cell)
[\(99+\) Linda \(Callender\) Pannock, PMP, PgMP | LinkedIn](#)
lpannock@comcast.net

CAREER SUMMARY

Over 25 years of experience leading clients successfully through transformational change at critical inflection points. With a focus on the bottom line, easily tackles complex, cross-functional, multi-country, multiyear strategic initiatives; successful merger and acquisition integrations; and divestitures and separations that create significant business value. Contributes broad business and deep technology expertise leading with a horizontal perspective to ensure team alignment and commitment.

Leverages expert facilitation skills, strong win-win negotiation perspectives, and keen political sensitivities to drive change. Leadership approach is people-centric with a bias toward action. Encourages teams to move fast, learn quickly, and iterate to achieve significant results. Results-driven, pragmatic approach creates synergies that establish a firm foundation for continued growth.

Experience is in a variety of industries, including healthcare, manufacturing, logistics, retail, professional services, and government.

PROFESSIONAL EXPERIENCE

Travo Consulting, LLC, Nashville, TN, 2022 – present

Co-founder / CEO – Provide consulting services in change management, advising or leading key programs or initiatives with significant business value, technology assessments and implementations, and M&A integrations.

Ankura Consulting Group, Nashville, TN, 2005-2022

Managing Director – Externally: Led accounts which included teams between 1- 30 consultants and included start-ups, Fortune 500 companies, healthcare expertise, M&A integrations, technology assessments and implementations, organizational assessments and change management. Internally: Led Managing Director leaders and grew team members, responsible for relationships, growth and P&L at assigned accounts and growth within Ankura as well as responsible for representing the Ankura brand within the community.

Integrated Store Solutions, LLC, Nashville, TN, 2004 2005

Director of Technology -- Directed the transition of a technology team for an Application Service Provider and the IT Infrastructure Team. In eight weeks, the IT team became a functioning / focused team, aligned with the business and the business strategy in the application development as well as the infrastructure. Developed and implemented a strategic direction for the technology of the company.

Net Impact Web Solutions, Nashville, TN, 2003 – 2004

Internet Business Consultant and President/CEO – As the owner of a WSI Internet Education and Consulting (www.wsicorporate.com) franchise, handle all financials, operations, sales and marketing, engagement management as well as being the Internet Business Consultant. As an Internet Business Consultant, direct small-to-medium clients in the best usage of Internet technology against their business objections. Provided CIO Services for a \$3M company to develop and implement a 3-year IT Strategy, built their staffing model, negotiated contracts with their vendors, improved their bottom-line for the IT expenditures, built a strategy that provides higher customer satisfaction and internal business efficiencies.

G. A. Sullivan, Nashville, TN, 1997 - 2002

Managing Consultant, Business Development Manager, Senior Consultant - Key member of team in opening and growing the Nashville office to 50 consultants. Responsible for building a market and developing \$2.5M worth of business. Developed seven key accounts within one year. Responsible for assessing the business and technology goals of a client and developing a strategy/proposal for technology solutions. Responsible for understanding skill sets of consultants and building winning project teams for the solutions. Client account

ownership included project delivery, business growth, engagement management and strategizing with clients on business solutions, organizational management, and IT management issues.

Whirlpool Europe B.V., Comerio, Italy, 1994 - 1996

IT Manager - Led a 30-person, multi-cultural, multi-vendor team in implementing a strategic Data Warehouse on a Teradata system for the centralization of the company's European information system for Sales and Marketing. Introduced multiple new technologies: formal information engineering development methodology, data warehouse, client/server technology,. Negotiated and coordinated the contracts for the out-sourcing of the software development. Worked with business users and technologists from various areas and with 14 locations/countries of the corporation.

Independent Consultant representing Rational GmbH, Munich, Germany, 1994

Software Engineering Consultant - Consulted at Alcatel SEL, Stuttgart, Germany on the Rational Booch OOA/D methodology and designed and directed the development of a software process and the documentation standards for a C++ telecommunications application. Led the integration of the Rational Rose tool into the current software process and the new software process.

Rational Software Corporation, Bethesda, MD, 1988 - 1994

Software Engineering Consultant—Performed Software Engineering responsibilities in three areas of business: Account Management, Pre-Sales, and Rational Business. Coached all clients on the implementation of an Object Oriented Analysis and Design, Booch Methodology, MIL-STD-2167 / MIL-STD-2167a.

Account Management - Successfully sold and developed a client/server testing strategy, which enabled the customer to increase productivity by 80% and to complete their deliverables on time. Developed this account into a Rational Referenceable Account. The efforts to build this account into a success included developing tools, which increased productivity, consulting on staffing issues, and initiating their software integration process.

Pre-Sales - Key member in the building of a sales team, which accomplished 200% of quota. The primary strategy was to discover the technical issues of potential customers, learn the client's software tools, and then build and demonstrate a win-win solution. Member of customer proposal teams and successfully persuaded all clients to bid the Rational Solution as the Software Engineering Environment.

Rational Business - Initiated internal training on Rational's Object-Oriented Analysis and Design Course, which supported the Booch methodology. Led a team of six Software Engineering Specialists within Rational. Provided market insight to our home office for the company product direction.

BDM Management Services Co., Austin, TX, 1984 - 1988**Application Development Manager, 1987-1988 and Technical Leader, 1986-1987**

Managed the system integration and system testing of a Global Positioning System prototype equipment into an embedded, real-time, data collection system. Responsible for the coordination of customer relations between six customers. Technical Manager during contract negotiations. Supervised a staff of 10 BDM technical personnel.

Software Designer, 1985-1986 and Software Programmer, 1984-1985

Initiated a strategy of parallel development that resulted in 25% reduction of completion time for the applications software. Trained eight programmers on an MIS project, which utilized an Rbase database on an IBM PC. Promoted the software general design using the Process Abstraction Methodology by George Cherry

EDUCATION

B.A., Computer Science, 1983, The University of Texas at Austin, Austin, Texas

COMMUNITY

Board Member, Vanderbilt Bill Wilkerson, 2004-present

Board Member, LEAD Public Schools, 2018-present

Rob Keller

VP, Client Services, Asurion



Experience



VP, Client Services

Asurion

2003 - 2020 - 17 yrs

Greater Nashville Area, TN

Executive position accountable for subscriber and revenue growth achievement for select national wireless carrier clients including primary responsibility for senior client relationships.

Served as VPGM over 20+ regional carrier clients with accountability for team management, P&L, senior client relationships, and contract negotiations.

Managed Sprint national growth team to sustained best-in-class sales metric success.

Created sales organizational template that is being continuously utilized across Asurion to maximize sales metric accountability and optimize scalability.

Three-time (in five opportunities) Achiever's Club winner (Asurion's highest sales recognition).



VP, Sales

Gigamedia Access Corporation - Full-time

2001 - 2003 - 2 yrs

Washington DC-Baltimore Area

Business Development role within start-up organization pursuing wireless carrier relationships and venture capital.



Director of Market Development

Nortel Networks - Full-time

2000 - 2001 - 1 yr

Atlanta Metropolitan Area

Chartered with development of product and services tailored to wireless carriers in Central and South America.



Director, B2B and Wireless Data Marketing

GTE Wireless/Verizon - Full-time

1994 - 2000 - 6 yrs

Atlanta Metropolitan Area

National HQ role overseeing distribution and product marketing for B2B products and services. Oversaw development and implementation of national Major Accounts distribution channel - first B2B channel at GTE Wireless. Twice promoted including leadership of all B2B marketing and oversight of wireless data strategy and B2B product development.



Sales Executive

Digital Equipment Corporation · Full-time

1987 – 1994 · 7 yrs

Cincinnati Metropolitan Area

Successful sales executive working with major client – GE Aircraft Engines – on large technology hardware and service contracts. Directed successful sales campaign resulting in closure of Digital's largest FDDI network installation. Team leader in strategy development and implementation of multi-million dollar, five-year outsourcing contract – Digital's largest outsourcing win. Twice promoted. Twice achieved Circle of Excellence.



Account Representative

Unisys · Full-time

1983 – 1987 · 4 yrs

Cincinnati Metropolitan Area

Computer systems and services territory sales. Top-ranked commercial account representative three straight years.

C. Alex Ryerson

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EXPERIENCE

Luxor Capital

New York, NY/Nashville, TN

Partner

2007-2022

Generate and analyze equity and distressed credit investment opportunities for a multi-billion long-short hedge fund

Sector coverage includes technology, media, telecommunications and distribution

Member of the firm's investment committee

Responsibilities include building and developing detailed valuation analyses and operating models; analyzing historical operational and financial performance; meeting and interviewing management, customers, suppliers and competitors; presenting investment ideas to other partners; and determining the optimal hedging/risk management strategy

Bridger Capital

New York, NY

Summer Analyst

Summer 2006

Generated and analyzed investment opportunities in the energy, telecommunications, manufactured housing and service sectors for a \$2 billion long-short equity hedge fund

Met and interviewed research analysts, management teams, competitors and customers in order to evaluate investment merits

Miller Buckfire & Co., LLC

New York, NY

Associate, Financial Restructurings and Reorganizations

2002-2005

Advised companies and creditors in connection with out-of-court, pre-packaged chapter 11 and traditional chapter 11 restructurings; distressed sale processes; and private debt and equity financing transactions

Prepared and presented new business pitches, sale and financing offering memoranda, Board of Directors and management presentations, internal marketing materials and documents to be entered into evidence at bankruptcy court hearings

Wasserstein Perella & Co/Dresdner Kleinwort Wasserstein

Dallas, TX

Investment Banking Analyst, Mergers & Acquisitions

2000-2002

Developed complex financial models for merger and acquisition transactions, leveraged buyout transactions and equity offerings to analyze, when applicable, credit statistics, accretion/dilution, investor returns and other analyses

Performed company valuations using comparable companies, comparable transactions and DCF methodologies

EDUCATION

Stanford University Graduate School of Business

Palo Alto, CA

Masters Degree in Business Administration

June 2007

- Member of the Finance and Investment Club, Wine Circle Club and Golf Club
- President of Challenge for Charity
- Co-head of the GSB Gives Back Auction (raised \$125,000 in proceeds for Special Olympics and Boys & Girls Club)

Vanderbilt University

Nashville, TN

Bachelor of Science, Magna Cum Laude, 3.6 GPA

May 2000

- Triple Major in Engineering Science, Mathematics and Economics; Minor in Management of Technology
- Dean's List for six quarters
- Phi Delta Theta Fraternity (*Intramural Chairman*)

ADDITIONAL INFORMATION

- GMAT – 760 (99th percentile)
- Community: Family and Children's Service Board of Directors, Lead Public Schools Board of Directors, Vanderbilt Alumni Association Board of Directors, Swan Ball Auction Committee, Actively involved in Nuru International, One Acre Fund, and The Ponheary Ly Foundation, Previous President of the Board of Trustees of Fifth Avenue Presbyterian Church (2014-2105)
- Interests: tennis, golf, live music, fly fishing, gardening, Vanderbilt athletics, and traveling

Michael E. Honious

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mike.honious@geodis.com

Profile

Senior level executive with twenty-eight years' experience leading supply chain operations in the 3rd party and specialty retail industry. As a member of senior management, responsible for the execution of company strategies and development of business and people plans. Demonstrated achievement in leading diverse teams, large scale operations, warehouse design, warehouse management system implementation, facility startups, process improvements, and cultural transitions. Delivered exceptional results in customer service, cost, and people metrics throughout career. A hands-on executive with excellent team management and communication skills with the ability to work cross functionally driving change.

Professional Experience

GEODIS

2005 - Present

Leading provider of global supply chain management solutions including transportation, warehousing and distribution, customs brokerage, freight forwarding, and import and export consulting services.

Chief Executive Officer and President Americas

\$3.5B USD Annual Sales Revenue . Responsible for Contract Logistics, Freight Forwarding, Transportation Management, Business Development, Strategic Management Office, Legal, Accounting & Finance, Human Resources, Engineering & Technology, ProVenture, Shared Service Center and IT in North and South America.

Chief Operations Officer Americas

\$1.3B USD Gross Profit P&L. Contract Logistics responsibilities for Canada, US, Mexico, Chile, Brazil, and Colombia, encompassing 160+ buildings and 14,000+ employees.

GEODIS has experienced from 2016 through to 2020 gross profit growth of 11% CAGR and EBITDA growth of 11% CAGR. Balanced growth has been fueled by new business wins and effective execution of our strategic plans. In particular, ecommerce has been a meaningful contributor to our revenue and EBITDA growth, while continuing our focus on process and productivity.

Chief Operations Officer North America

OHL prior to GEODIS acquisition, \$800M USD Gross Profit P&L. Warehousing responsibilities for Canada and US, encompassing 140+ buildings and 10,000+ employees.

Former OHL experienced from 2011 through to 2015 gross profit growth of 15% CAGR and EBITDA growth of 11% CAGR. Growth has been fueled by innovation and focus on creating a core foundation in process and productivity.

Senior Vice President Operations

\$200M USD Gross Profit P&L. Warehousing responsibilities for South East region of North America for campus locations in Atlanta, Southeast Port corridor, Dallas, Memphis, and Nashville.

Implemented succession planning process across South East region that resulted in key leadership promotions. Developed KPI's on retention and full-time resources, increasing full time employment to over 75% in core operations. Successfully managed region out of a recession while sustaining profitability.

Senior Vice President Engineering and Solutions

Solutions, Logistics Engineering, Operational Excellence, Project Management, Risk Management, Systems Implementation, and Material Handling Resources (forklift business unit).

Accountable for solution and pricing of new business opportunities exceeding \$50M USD in gross profit. Implemented Project Management Office accountable for over 50+ successful account start-ups. Increased startup account EBIDTA by 30% in first year. Developed Operational Excellence program with \$3 million in annualized labor savings. Program consisted of training, methods / standards evaluation, productivity tracking, and staffing plans.

Vice President Engineering

Logistics Engineering, Operational Excellence, Project Management, Risk Management, and Quality.

Gap Inc.

1992 - 2005

Global specialty retailer selling casual apparel, accessories and personal care products for men, women and children under a variety of brand names, including Gap, Banana Republic, and Old Navy. Gap Inc. operated a total of 3,022 store locations with annual sales of \$16B USD.

Director Engineering

Global Engineering Services with direct reports in Canada, UK, and US. Leadership responsibilities for 20+ engineering professionals.

Sr. Director Operations

Expense Budget \$50M USD; Distribution of goods exceeding \$4.3B USD Gross Revenue; Headcount 1500+ associates; three distribution centers totaling 2.2M sq. ft.

Director Operations

Expense Budget \$24M USD; Headcount 1000 associates; service 20 markets and 400 Old Navy stores; Responsible for 1M sq. ft. facility operating 6 days x 24 hours.

Manager Operations

558,000 sq. ft. Full Case facility; Headcount 100 associates; service 44 markets and 600 Old Navy stores.

Technical Services Manager

Maintenance department with 40 mechanics; Engineering department with two Industrial Engineers and one Statistician.

Project Manager

Reconciliation of \$5 million budget; facilitator of design meetings; project manager for Warehouse Management System; project timeline tracking and issue resolution.

Industrial Engineer

Facility layout, material handling design, improving work cells layout, and implementing labor standards.

Education

University of Dayton

Bachelor of Science, Industrial Engineering Technology

Muncie Area Career Center

Education Certificate, Design Draftsman

Special Training

Managing Effective Supply Chains
Penn State University
Leading Organizational Transition
Linkage Inc. / William Bridges and Associates
Executive Leadership
Vanderbilt University
Financials for Executives
University of Tennessee
Supply Chain Forum
Leadership Alliance International, LLC
Executive Coach
GAP International
GENIUS Conference
The Collective Global
Leadership Engagement
Harvard University
Disruptive Strategy

Social Responsibility

Board Member
Co-Founder **GEODIS Foundation and Compassion Fund**
Volunteering assignments with Habitat for Humanity, Second Harvest, Junior Achievement, and many more.
Habitat for Humanity Nashville
Board member
LEAD Public Schools Metro Nashville
Board Chair

M. Annette Little
Professor
2006 Adams Road
Charlotte, TN 37036
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Curriculum Vitae

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College of Education
Lipscomb University
One University Park Drive
Nashville, TN 37204
Phone (615) 966-5786
Email: annette.little@lipscomb.edu

Biographical Data

Birth date: November 12, 1971
Place of Birth: Nashville, Tennessee
Citizenship: USA

Education

PhD Peabody College at Vanderbilt University May 2007
Dissertation title: Self-Regulated Strategies Development for Improving
the Writing Skills of Students with Internalizing Behavior Patterns and Writing
Concerns
Graduate Advisor: Kathleen L. Lane, PhD, BCBA
MA Austin Peay State University August 2002
BS The University of Tennessee at Martin December 1994

Certifications

Licensed Behavior Analyst, 00000000001, 2017 (current), Nashville, TN.
ACE Provider for Behavior Analysis Certification Board, IP-13-2394, 2014 (current)
Board Certified Behavior Analyst, 1-06-2814, 2006 (current)
TN Professional teaching license, 000211573, 1994 - 2019

Professional Memberships

American Association of Colleges for Teacher Education
Association for Behavior Analysis International
Association of Professional Behavior Analysts
Association of State and Provincial Psychology Boards
Served as state delegate – October 2016 Annual meeting
Autism Society of Middle Tennessee
Board of Examiners of Psychology – May 2015 to May 2017
Chair of ABA Licensing Committee – May 2015 to May 2017
Council for Children with Behavior Disorders
Council for Exceptional Children

Teacher Education Division of Council for Exceptional Children
Tennessee Association for Behavior Analysis-
President – November 2014 – November 2016
Chair of Publications committee- November 2012 to November 2013
Middle Tennessee representative – November 2009 to October 2012
Tennessee Association of Colleges for Teacher Education
Tennessee Association of Independent Liberal Arts Colleges of Teacher Education
Past-President – February 2018 to February 2020
President – February 2016 to February 2018
President-elect – February 2014 to February 2016

Scholarship

Publications (13)

- Campbell, M. & Little, M. A. (2018, submitted for review). DRA, DRL, and self-monitoring of adult student behavior. *Journal of Positive Behavior Interventions*.
- Barton-Arwood, S. M. & Little, M. A. (2013). Using graphic organizers to access the general curriculum at the secondary level. *Intervention in School and Clinic*, 49, 6-13.
- Lane, K. L., Graham, S., Harris, K. R., Little, M. A., Sandmel, K., & Brindle, M. (2010). Story writing: The effects of self-regulated strategy development for second grade students with writing and behavioral difficulties. *Journal of Special Education*, 44, 107-128.
- Lane, K. L., Little, A. L., Menzies, H. M., Lambert, W., & Wehby, J. H. (2010). A comparison of students with behavioral challenges educated in suburban and rural settings: Academic, social and behavioral outcomes. *Journal of Emotional and Behavioral Disorders*, 18, 131-148.
- Little, M. A., Lane, K. L., Harris, K., Graham, S., Story, M., & Sandmel, K. (2010). Self-regulated strategies development for persuasive writing in tandem with schoolwide positive behavioral support: Effects for second grade students with behavioral and writing difficulties. *Behavioral Disorders*, 35, 157-179.
- Sandmel, K., Brindle, M., Harris, K., Lane, K. L., Graham, S., Nackel, J., Mathias, R., & Little, A. (2009). Making it work: Differentiating tier two writing instruction with Self-Regulated Strategies Development in writing in tandem with School-Wide Positive Behavioral Support. *Teaching Exceptional Children*, 42, 22-35.
- Lane, K. L., Little, M. A., Casey, A. M., Lambert, W., Wehby, J. H., Weisenbach, J. L., & Phillips, A., (2009). A comparison of systematic screening tools for emotional and behavioral disorders, *Journal of Emotional and Behavioral Disorder*, 17, 93-105.
- Lane, K. L., Little, M. A., Redding Rhodes, J., Phillips, A., & Welsh, M. T. (2007). Outcomes of a teacher-led reading intervention for elementary students at-risk for behavioral disorders. *Exceptional Children*, 74, 47-70.
- Lane, K. L., Weisenbach, J. L., Little, M.A., Phillips, A., & Wehby, J. (2006). Illustrations of function-based interventions implemented by general Education teachers: Building capacity at the school site. *Education and Treatment of Children*, 29, 549-571.
- Lane, K. L. & Little, M. A. (2006). Antisocial Behavior (pp. 495-496). In N. J. Salkind (Ed.). *The encyclopedia of human development: behavior modification and therapy: Volume 1.* (pp. 103-105). Thousand Oaks, CA: Sage Publications.
- Lane, K. L., Wehby, J., Little, M. A., Cooley, C. (2005). Academic, social, and behavioral profiles of students with emotional and behavioral disorders educated in self-contained

- classrooms and self-contained schools: Part I – Are they more alike than different? *Behavioral Disorders*, 30, 349-362.
- Lane, K. L., Wehby, J., Little, M. A., Cooley, C. (2005). Students educated in self-contained classrooms and self-contained schools: Part II – How do they progress over time? *Behavioral Disorders*, 30, 363-374.
- Lane, K. L., Pierson, M., Robertson, J., & Little, A. (2004). Teachers views of prereferral interventions: Perceptions of and recommendations for implementation support *Education and Treatment of Children*, 27, 420-439.

Conference Presentations (72)

- Little, M.A., et al. (2022). Thumbs down for ABA: Strategies for recognizing and preventing trauma in ABA. Tennessee Association for Behavior Analysis, Nashville, TN.
- Scretchen, P. & Little, M. A. (2022, April). Trauma informed instruction through an ABA lens. Global Voices, Nashville, TN.
- Smith, C., Little, M. A., Urbanczyk, B., & Plunk, L. (2020, May). Poster: Collaboration between school personnel and behavior analysts. The Association for Behavior Analysis International Annual Conference, Virtual.
- Smith, C., Little, M. A., Urbanczyk, B., & Plunk, L. (2019, November). Collaboration between school personnel and behavior analysts. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Weaver, L., Tobenski, K., Holt, R., Santana, A., Scretchen, P., Little, M. A. (2019, November). Panel discussion: Creating a culturally aware and responsive environment. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A. (2019, June). Discussant: An open dialogue on cultural diversity as a first step toward developing professional self-awareness. The Tennessee Association for Behavior Analysis Middle Regional conference. Nashville, TN.
- Ashmeade, K. & Little, M. A. (2018, November). Diversity vs. Inclusion: Understanding personal identity in applied behavior analysis. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A. (2017, October). The Rural Culture in TN: Applications for ABA Implementation. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A. (2017, July). Understanding behavior. Family and Friends Conference, Nashville, TN.
- Little, M. A. (2017, May). The utilization of professional learning communities to build stronger supervision. Association for Behavior Analysis International, Denver, CO.
- Fox, J., Little, M. A., & King, S. (2017, May). Preliminary Analysis of a Survey Evaluating Applied Behavior Analysts' Knowledge and Use of Evidence-Based Practice. Association for Behavior Analysis International, Denver, CO.
- Anglim, M., Little, M. A., & Timm, J. D. (2017, May). Differential Reinforcement of Alternative Behavior, Differential Reinforcement of Lower Rates of Behavior, and Self-Monitoring of Adult Student Behavior. Association for Behavior Analysis International, Denver, CO.
- Parker-Peters, M. & Little, M. A. (2017, March). Effects of Political Mandates on Liberal Arts EPPs. Association of Independent Liberal Arts Colleges of Teacher Education, Tampa, FL.
- King, S., Little, M.A., & Fox, J. (2016, October). EBP: Every Behaviorist's Problem. The Tennessee Association for Behavior Analysis, Nashville, TN.

- Little, M. A. & Lambert, J. (2016, October). Professional Learning Communities: Working Together to Build Stronger Supervision. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A. (2016, October). Presidential Remarks and Welcome. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A. (2016, June). The Good, the Bad, and the Ugly: Behavior Management that Works in Any Classroom Setting. Summer Alumni Summit, Nashville, TN.
- Little, M. A. (2016, May). Supervising the Supervisor: Accountability in Field Supervision. The Association for Behavior Analysis International, Chicago, IL.
- Little, J. W. & Little, M. A. (2016, May). Sexuality and Autism Spectrum Disorder. Disability MegaConference, Nashville, TN.
- Little, M. A. (2015, October). TABA Welcome and Presidential Address. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A., Fox, J., Simcoe, K., Mahoney, & M., Edwards, S. (2015, October). Evidence-based Practice in ABA: Overview, Application, and Implications. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Houchins-Juarez, N. & Little, M. A. (2015, October). Current Issues in Supervision. The Tennessee Association for Behavior Analysis. Nashville, TN.
- Little, M. A. (2015, August). Supporting Your Child with Special Needs. Parent University, Nashville, TN.
- Little, M. A. (2015, June). President's Welcome and TABA Business. Middle Tennessee TABA Conference, Nashville, TN.
- Little, M. A. (2015, June). Social Emotional Learning through an ABA Lens, 2015 Social Emotional Learning Conference, Nashville, TN.
- Little, M. A. (2015, May). Data Driven Supervision in the Field of Applied Behavior Analysis. Association for Behavior Analysis International, San Antonio, TX.
- Little, M. A. & Little, C. F. (2015, May). Farm as Recreation and Strengthening Social Skills. Disability MegaConference, Nashville, TN.
- Little, M. A. (2015, April). Presidential Address. West Tennessee TABA conference, Memphis, TN.
- Juarez, A. P., Fox, J., Lambert, J., Little, M. A., Meindl, J. (2014, October). A Debate: Defining, Considering, and Implementing Punishment-based Procedures. Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A., Barton-Arwood, S., Music, A. (2014, October). A Process for Supervision of Candidates in the Field of Applied Behavior Analysis. Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A. (2014, October). Modeling Evidence in Field Work. Association for Christian Educator Preparation Programs, Nashville, TN.
- Little, M. A., Spooner, H., & Skeen, J. (2014, August). Reach Higher: Opportunities for Uniting with Higher Education. PATH Intl. Conference, Region 5, Murfreesboro, TN.
- Little, M. A. (2014, August). Socials Skills Instruction on the Farm. Uniting EAAT and Higher Education, Murfreesboro, TN.
- Little, M. A. & Little, C. F. (2014, July). Social Skills Instruction for Children and Young Adults. Social Emotional Learning Conference, Nashville, TN.
- Little, M. A. (2014, July). Using Data to Promote Responsible Decision Making. Social Emotional Learning Conference, Nashville, TN.

- Little, M. A. & Anderson, A. (2014, June). Distinctly Christian: Teaching ABA in a Traditionally Atheistic Field. Summer Alumni Summit, Nashville, TN.
- Little, J. W. & Little, M. A. (2014, May). Growing Up With Autism. Disability MegaConference, Nashville, TN.
- Little, M. A., Barton-Arwood, S., & Music, A. (2014, May). Fidelity of Supervision of Field Experience (Group and Individual). Association for Behavior Analysis International, Chicago, IL.
- Music, A. & Little, M. A. (2014, May). Using Behavioral Skills Training for Skill Acquisition of Task List Items. Association for Behavior Analysis International, Chicago, IL.
- Little, M. A. & Scretchen, P. (2013, November). Enhancing the social life of people with Autism Spectrum Disorder. Autism Society of Middle Tennessee, Nashville, TN.
- Little, M. A. & Anderson, A. (2013, October). Embedding the Bible in an Ethics Course: Using a Behavioral Approach. Association for Christian Educator Preparation Programs. Memphis, TN.
- Little, M. A. & Barton-Arwood, S. (2013, June). Treatment integrity of ABA supervision. Onward and Outward 2013 TABA Regional Conference. Franklin, TN.
- Little, M. A. & Barton-Arwood, S. (2013, May). Evaluating fidelity of implementation in supervision of candidates working toward ABA certification. Association for Behavior Analysis International, Minneapolis, MN.
- Little, M. A. & Beddow, P. (2012, October). Social validity in school-based programs. Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A., Zhang, J., & Davis, B. (2012, October). Working with the system during the economic downturn. Tennessee Association for Behavior Analysis, Nashville, TN.
- Barton-Arwood, S., Little, M. A., & Lunsford, L. (2012, October). Evaluating fidelity of implementation: Supporting correct and sustained use of evidence-based practices. Tennessee Council for Exceptional Children, Nashville, TN.
- Little, M. A. & Scretchen, P. (2012, June). Using behavioral methods to enhance the social life of adults with ASD. Disability MegaConference, Nashville, TN.
- Little, M. A., Stenson, C., Gilchrist, L., & McGraner, K. (2012, March). PhDs and EdDs: A Panel Series Discussion on Education's Two Terminal Degrees. Vanderbilt University, Nashville, TN.
- Little, M. A. (2011, October). Working together in the public school system. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A. (2011, October). Communicating with families. The Tennessee Association for Behavior Analysis, Nashville, TN.
- Little, M. A., Scretchen, P., & Coffey, S. (2011, June). Connecting behavior and communication using ABA techniques. Ninth Annual Tennessee Disability MegaConference. Nashville, TN.
- Eadie, M. L. & Little, M. A. (2011, April). How DynaVox helps develop language and provide behavioral support. The Middle Tennessee TABA conference. Nashville, TN.
- Little, M. A., McCoy, J., & Ashmeade, K. (2009, September). Autism treatments across disciplines. Tennessee National Association for the Dually Diagnosed. Nashville, TN.
- Lane, K. L. & Little, M. A. (2009, May). A comparison of systematic screening tools for emotional and behavioral disorders. Association for Behavior Analysis International. Phoenix, AZ.

- Little, M. A., Anderson, A., White, K. M. (2008, September). A presentation of case studies utilizing an integrative approach to treating individuals with intellectual and developmental disabilities. Tennessee National Association for the Dually Diagnosed. Nashville, TN
- Little, M. A. (2008, May). Behavioral Approaches for Coping with & Redirecting/Reducing Restricted & Repetitive Behaviors. Autism Society of Middle Tennessee at Vanderbilt Kennedy Center.
- Harris, K., Lane, K. L. Sandmel, K., Brindle, M., Little, M. A., & Graham, S. (2008, April). Strategies instruction and positive behavioral support for second graders at risk for EBD. A paper presented at Council for Exceptional Children. Boston, MA.
- Little, M. A., Lane, K. L., Harris, K., & Graham, S. (2008, February). Self-regulated strategies development for improving the writing skills of students with internalizing behavior patterns and writing concern. A paper presented at the Midwest Symposium for Leadership in Behavior Disorders, Kansas City, Missouri.
- Harris, K., Lane, K. L., Graham, S., Little, M. A., Brindle, M., & Sandmel, K. (2007, November). The Effects of Self-Regulated Strategies Development and Positive Behavior Supports on Writing for Students At-Risk for Writing and Behavioral Difficulties. Vanderbilt Kennedy Center Event, Nashville, Tennessee.
- Little, M. A. (2007, October). Self-regulated strategies development for improving the writing skills of students with internalizing behavior patterns and writing concerns. Council for Children with Behavioral Disorders, Dallas (Irving), Texas.
- Lane, K. L., Wehby, J., & Little, A. (2007, February). Project PREVENT: Preliminary findings of school based interventions to prevent the development of learning and behavior problems. Midwest Symposium for Leadership in Behavior Disorders, Kansas City, Missouri.
- Little, A. L., Rhodes, J. R., Lane, K. L., Zimmerman, J., & Brown, B. (2006, November 17). Outcomes of an academic intervention for first-grade students identified as at-risk for EBD. A paper presented at Teacher Educators for Children with Behavioral Disorders, Tempe, AZ.
- Lane, K. L., Parks, R. J., Bergman, W., Merwin, M. T., & Little, A. (2006, November 17). Outcomes of function-based interventions for middle and elementary age students who were nonresponsive to primary intervention efforts. A paper presented at Teacher Educators for Children with Behavioral Disorders, Tempe, AZ.
- Weisenbach, J., Little, A., Phillips, A., & Lane, K. L. (2006, November). Illustrations of function-based interventions implemented by general education teachers: Building capacity at the school site. A paper presented at the Tennessee Association of Applied Behavior Analysis. Nashville, TN.
- Little, A., Redding Rhodes, J., Lane, K. L., Phillips, A., Zimmerman, J., & Brown, L. (2006, November). Supplemental reading instruction for first grade students at-risk for emotional/ behavioral disorders. A paper presented at the Tennessee Association of Applied Behavior Analysis. Nashville, TN.
- Lane, K. L., Little, A., Phillips, Weisenbach, J., & Merwin, M. (2006, May). Efficacy of academic and behavioral interventions in preventing the development of emotional and behavioral disorders: Preliminary outcomes. A paper presented at an international symposium at the Association for Behavioral Analysis International. Atlanta, GA.

- Lane, K. L., Phillips, A., Weisenbach, J., Little, A., & Merwin, M. (2006, May). Function-based interventions to manage problem behaviors in elementary classrooms: A systematic, validated approach. A poster presented at an international symposium at the Association for Behavioral Analysis International. Atlanta, GA.
- Lane, K.L., Wehby, J., Little, A., Phillips, A., Weisenbach, J., Merwin, M., & Thompson, A. (2005, November 18). The efficacy of school-based interventions to prevent the development of learning and behavior problems at the elementary level: Preliminary findings of Project PREVENT. A paper presented at Teacher Educators for Children with Behavioral Disorders, Tempe, AZ.
- Weisenbach, J., Little, A., & Lane, K.L. (2005, November). A functional assessment-based intervention to increase the positive social interactions of a second-grade student in a regular classroom setting. Tennessee Association of Applied Behavior Analysis, Nashville, TN.
- Lane, K. L., Wehby, J. H., Little, A., Starko, S., Thompson, A., & Raines, S. (2005, February). Project PREVENT: Screening and intervening to prevent the development of learning and behavior problems – preliminary findings. Midwest Symposium for Leadership in Behavior Disorders, Kansas City, Missouri.
- Lane, K.L., Wehby, J., Little, A., Thompson, A. & Raines, S. (2004, November). Early detection of learning and behavior problems at the elementary level: Preliminary findings of project PREVENT. A paper presented at Teacher Educators for Children with Behavioral Disorders, Tempe, AZ.
- Lane, K. L., Barton-Arwood, S. Savage, S., Mofield, E., Little, A., Robertson, J., Catchings, C., McDade, K., Moriarty, A., & McAtee, K. (2004, April). *Positive behavior support at the high school level: What we've learned and recommend*. A paper presented at the Tennessee Branch of the International Dyslexia Association. Nashville, TN.

Research Experience

Focus: Exploring academic and behavior interventions at the primary, secondary, and tertiary levels for students with or at risk for behavior problems.

Project Connect: Co-Principle Investigator – Spring 2012. Designed and developed research to explore teaching strategies in a school in Grand Goâve, Haiti.

Project WRITE: Project Coordinator – August 2006-June 2007. Coordinated Study 1 (a multiple baseline with multiple probes design). Coordinated and conducted research assistant trainings in screening procedures and assessments. Coordinated and conducted writing interventions with students in general education 2nd grade classrooms.

Project PREVENT: Project Coordinator-May 2004-July 2006. Coordinated Study 1 (Identify, Assess, and Follow) and Study 2 (Identify, Assess, Intervene, and Follow). Coordinated and conducted teacher trainings, screening procedures, student assessments, and academic and behavioral interventions for students in grades K-4th.

Project Positive Behavior Support (PBS): Research Assistant-August 2003-May 2004. Monitored interventions; collected and entered school wide data at the high school level.

Dissertation Committee - Chair

2021-2022 - A Mixed-Methods Study on the Implementation of Trauma-Informed Practices in a Rural Elementary School. 2 students

2020-2021 - Reading Plus. 3 students
2019-2020 - Dickson County Schools. 2 students
2018-2019 - Homework Hotline. 3 students.
2017-2018 - Robertson County Schools. 3 students.
2017-2018 - TN Inclusive Higher Education Alliance. 3 students.
2016-2017 - RTI in a Rural Tennessee School District: Perceptions, Implementation, and Achievement. 3 students.

Dissertation Committee - Member

2017-2018 - Cheatham County Board of Ed.
2016-2017 - Perceptions of the Impact of the IDEAL Program on Lipscomb University's Campus. 2 students.

Service

Guest Reviewer:

Journal of Positive Behavior Interventions – February 2007 to present
Peter Lang Publishing - November 2017-April 2018
Pediatrics - April 2017
Remedial and Special Education – May 2011 to 2013
Education and Treatment of Children – December 2009
January 2007
July 2006
December 2009

Committee Work:

State Level

Tennessee Licensure Committee for Applied Behavior Analysts – Consultant June 2017 to present
Tennessee Licensure Committee for Applied Behavior Analysts – Chair May 2015 to June 2017
Board of Examiners of Psychology - Ex Officio Member – May 2015 to June 2017

University Level

Lipscomb Tenure, Promotion, Leave – August 2014 to present
Lipscomb Joshua Project – August 2014 – May 2015
Belmont Faculty Senate – August 2012 to May 2013
Belmont Faculty Work Life – August 2012 to May 2013
Belmont Honor Council – August 2008 – May 2013
Belmont Undergraduate Catalog and Curriculum – August 2012 to May 2013

College Level

Graduate Education Scholarship Committee – August 2017 - present
Lipscomb ACEPP conference committee – July 2014-October 2014
Belmont Undergraduate Catalog and Curriculum – August 2012 to May 2013

Department Level

Belmont CAEP Standard 1 –Chair- January 2012 – May 2013
Belmont Gateway 2 – Chair – August 2011-May 2012

Community

Common Ground Cooperative, Nashville, TN – Board member – July 2016 to February 2020

Client Recruitment Committee – October 2016 to February 2020
LEAD Public School Board – August 2015 to present
LEAD Public School Academic Committee – September 2014 to present
Chair of Academic Committee– September 2016 to present
Executive Committee member – May 2017 to present
CEO Search Committee member – August 2017 – May 2018
School Board member St. Patrick’s School, McEwen, TN – August 2014 – August 2017
Secretary – August 2014 to August 2017
Chair of Development Committee – November 2016 to August 2017
St. Christopher’s Church
Parish Council member – January 2013 – December 2016
Subsidy committee member – January 2013 – May 2018
Lector – January 2011 – May 2016

Inservice:

Hattie Cotton STEM Magnet Elementary, Nashville, TN, August 2022
“Trauma Informed Practice in the Classroom”
Gateway Elementary, Nashville, TN, August 2022
“Trauma Informed Practice in the Classroom”
Virtual training, Hangzhou, China, December 2021
“Autism Spectrum Disorder”
Emerald Academy Charter School, Knoxville, TN, July 2021
“De-escalation in the Classroom”
Aquinas College, Nashville, TN, February 2020.
“Merging Characteristics with Interventions”
Emerald Academy Charter School, Knoxville, TN, January 2019.
“Behavior Management Through an ABA Lens”
Lipscomb University College of Education, Student Teacher Seminar, November 2017
“Behavior Management at the School, Classroom, and Individual Levels”
McEwen High School, November 2017
“Autism and Behavior Management”
SALAMA Urban Ministries, June 2017
“Behavior Management that Works for all Students”
LEAD Charter Schools, March 2017
“The Good, the Bad, and the Ugly: Behavior Modification in the Classroom”
Lipscomb Academy Elementary School, February 2017
“The Good, the Bad, and the Ugly: Behavior Management that Works in Any Classroom Setting”
LEAD Charter Schools, July 2016
“Universal Design for Learning”
LEAD Charter Schools, March 2016.
“IEP Goals and Special Education”
St. Patrick Catholic School, October 2015.
“Universal Design for Learning”
Humphrey County School Board, July 2015.
“Autism Spectrum Disorder”

Lipscomb University, June 2015

“The Power of Inclusion 2015: Academic and Behavior Support for Students with Disabilities in Private School Settings”

Davidson County Juvenile Detention Center, August 2014

“How Do We Change Behavior?”

Overbrook Elementary, March 2014

“Diverse Learners: Identifying Needs and Concrete Methods of Instruction”

Siloë School, Grand Goâve, Haiti, September 2012

“Professional Learning Communities”

McEwen Elementary, McEwen, TN

“Autism Spectrum Disorder” Fall 2011

Haiti Partners Principal Workshop, Haiti

“Connecting Reflective Teaching with Student Learning” May 2011

St. Henry School, Nashville, TN

“Universal Design for Learning” Fall 2009

St. Patrick’s School, Humphreys County:

“School-wide Behavior Management” Fall 2005

“Classroom Management for Students with ADHD” Spring 2004

“ADHD: A Positive Phenomenon to be Encouraged in Students” Fall 2000

Podcasts/Webinars

Little, M. A. (2022, June 28). *Trauma Informed Applied Behavior Analysis* [webinar]. Ayers Institute for Learning and Innovation. <https://www.lipscomb.edu/ayers>

Little, M. A. (2021, June 21). *Studies in Applied Behavior Analysis at Lipscomb University* [podcast]. ABA Technologies, Inc. <https://abatechnologies.com/>

Administrative Duties

Director of Studies in Applied Behavior Analysis – June 2013- present

Faculty Advisor – Studies in Applied Behavior Analysis – June 2013 to present

Teaching/Professional Experience

Applied Behavior Analysis

Owner of A. Little Way providing trainings and behavioral consultation for schools and families. – August 2013-present

Board Certified Behavior Analyst - Scarab Behavioral Health Service – June 2007 to March 2012

Behavior Analysis Clinic at Vanderbilt (Internship) – December 2004 to July 2005 – worked with adults entering community after a stay at Middle Tennessee Mental Health Institute (MTMHI). Developed BIPs and FBAs with both adults at MTMHI and children at Vanderbilt’s Psychiatric Hospital. Supervised by Craig Kennedy, Peabody College, Nashville, TN

College Level Teaching

Professor of Education, Director of Studies in Applied Behavior Analysis Lipscomb University – June 2019 to present

Associate Professor of Education, Director of Studies in Applied Behavior Analysis Program

Lipscomb University – June 2013 to June 2019
Assistant Professor of Education –
Belmont University – August 2008 to May 2013
Adjunct Instructor –
Aquinas College – August 2013 to present
Lipscomb University- Summer 2008 to May 2013
Peabody College of Vanderbilt University SPED 1010 (Introduction to Exceptionality) –
Fall 2007
Belmont University EDUC 3800/5800 (Meeting the Needs of Diverse Learners) –
Summer 2007, Summer 2008
Peabody College of Vanderbilt University SPED 3210 (Managing Academic and Social
Behavior) – Summer 2007
Austin Peay State University EDUC 5430 (Fundamental Statistics for Behavioral
Sciences) Spring 2006
Austin Peay State University EDUC 5000 (Research in Education) – Spring 2006
Austin Peay State University SPED 3340/5340 (Development of Consultative Skills) –
Fall 2005, Fall 2006
Austin Peay State University EDUC 5430 (Seminar on Research) – Fall 2005
Guest Lecturer –
“Single Subject Design” – Lipscomb University EGSE 5063 (Research Methods) –
November 11, 2015
“Emotional Behavior Disorders” – Lipscomb University ED 3353 (Chara&Assess Stud.
w/ Disabilities) – October 28, 2015
“Reading interventions for students with EBD” – Peabody College SPED 3900 (SpTp:
Adv Reading in SPED) – June 26, 2007
“Increasing Behavior” – Peabody College SPED 3210 (Managing Academic and Social
Behavior) – October 9, 2005
“Structuring the Environment” – Peabody College SPED 3210 (Managing Academic and
Social Behavior) – October 02, 2003
Teacher Assistant –
Peabody College of Vanderbilt University SPED 3900 (Early Detection and Prevention) –
July 2005
Peabody College of Vanderbilt University SPED 3210 (Managing Academic and Social
Behavior) – Fall 2004

Primary/Secondary Level Teaching

Behavior I teacher (K-2nd grades)–Alternative Learning Center –August 2000-August 2003
Resource/Inclusion teacher (4-6th grades)–White Bluff Elementary–August 1997-August 1999
Principal-Chad Youth Enhancement Center–August 1996-August 1997
K-12 resource teacher-Jackson Academy–August 1995-August 1996
K-12 grade day treatment teacher-Jackson Academy–January 1995-August 1995

Professional References

Kathleen Lynne Lane (785) 864-9630
Professor of Special Education
University of Kansas Lawrence, Kansas 66045-3101

Kathleen.lane@ku.edu

Steve Graham (602) 543-6358
Professor
Mary Lou Fulton Teachers College
PO Box 37100 Mail Code: 3151
Phoenix, AZ, 85069
sgraham4@asu.edu

Joseph Wehby (615) 322-8190
Associate Professor, Peabody College
Vanderbilt University, Nashville
Joseph.wehby@vanderbilt.edu

Sally Barton-Arwood (615) 460-5452
Professor, Department of Education
Belmont University, Nashville
Sally.arwood@belmont.edu

JIMMY PATTON

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Executive Profile

Financial executive with experience and success in private industry and public accounting. Multiple roles over past 18 years with large, privately held mining and heavy highway construction company with focus on improving operational results, maintaining core financial processes, leading acquisition valuation efforts, and sourcing competitive funding in the bank and private placement debt markets.

Skill Highlights

Accounting & Finance	Incentive Comp Design
Analysis & Modeling	Cost Control Strategies
Forecasting & Planning	Process Improvement
Business Valuation	Banking Relations & Financing
Start-Ups & Acquisitions	Capital Budgeting
Insurance & Risk Management	Executive Level Presentations
Strategic Planning	Internal Controls & Audit
Defined Benefit & Compensation Plans	Staff Development

Certifications & Leadership Roles

Certified Public Accountant In Tennessee (inactive) License #13637
Certified Merger & Acquisition Advisor (inactive)
Six Sigma Green Belt Certified
Current Chair & Trustee of the Rogers Group Retirement Plan Investment and Administration Committee (+ \$100 million in assets)
Current Treasurer and Board Member of the Rogers Group Political Action Committee
Past Treasurer and Board Member of the Nashville Chapter Juvenile Diabetes Association

Current Board Member and Finance Committee Chair LEAD Public Schools

Professional Experience

Chief Financial Officer & Corporate Controller Rogers Group, Inc. - Nashville, TN	Jun 2010 to Current
Oversee all critical financial activities of the organization, with particular emphasis in corporate / field accounting, financing, and acquisition / development activities. Led valuation and participated on team targeting entry into several new states, which led to acquisition and development expenditures of + \$500 million. Led financial due diligence and projections for mining joint ventures and optimized the Company's split via analysis and negotiation.	
Vice President of Finance & Treasurer Rogers Group, Inc.	Apr 2006 to Jun 2010
Managed the Company's corporate accounting, tax, banking, treasury, insurance / risk management, and purchasing functions.	

Led valuation on largest acquisition in Company history.
Sourced funding and negotiated competitive rates in support of large capital outlays during midst of financial crisis in the summer / fall of 2008.
Developed relationship with insurance company that ultimately provided \$100 million

**Director of Corporate Accounting
Rogers Group, Inc.**

Jun 2004 to Apr 2006

Responsible for all corporate accounting and shared service activities, including annual external audit and state contractor qualification filings.
Co-lead on project to implement Oracle's automated purchase order system module across organization.
Co-lead on financial due diligence and projections for masonry block joint venture.

**Director of Business Analysis & Planning
Rogers Group, Inc.**

Apr 2002 to Jun 2004

Led valuations on all acquisition and development projects, along with oversight for all analysis, planning, and forecasting activities.
Developed and implemented a fixed / variable analysis system adopted as a standard for management reporting. Recognized with the President's Performance Award.

**Manager, Business Analysis & Planning
Rogers Group , Inc.**

May 1999 to Apr 2002

Managed the Company's annual business plan, interim forecasting, and capital budgeting processes, along with oversight of the department's analysis functions.
Financial lead and document author for the Company's 2001 five-year strategic plan.
Recognized with the Award of Excellence.
Led initiative to divest of excess real estate across the organization (+ \$3 million)

**Senior Financial Analyst
Rogers Group, Inc.**

Dec 1996 to May 1999

Prepared analysis in support of management decisions and worked as part of team responsible for the annual business plan, interim forecasting, and capital budgeting processes.
Project leader on initiative to move the Company's employee travel & entertainment expense reporting from a manual to automated process via software program developed in-house.

**Senior Auditor
Rogers Group, Inc.**

Jul 1995 to Dec 1996

Performed testing of the Company's internal control structure and prepared formal reports for presentation to management and the Audit Committee.
Created the Company's first audit risk assessment plan that profiled locations and markets based on objective criteria.

Senior & Staff Auditor

Jan 1991 to Jul 1995

Kraft CPAs / Marlin & Edmondson PC - Nashville, TN

Led and participated in assurance service / audit engagements across a broad spectrum of industries, with emphasis on banking, manufacturing, health care, and not-for-profit.

Prepared tax returns for individuals, corporations, and partnerships.

Involved in non-traditional roles, such as litigation support and forensics.

Education

EMBA, General Management

2000

Vanderbilt University, Owen Graduate School of Management - Nashville, TN

BBA, Double Major Accounting & Finance

1990

Belmont University - Nashville, TN

Earl Lattimore

Instructor/Program Coordinator, Meharry Medical College

← Experience



Instructor/Program Coordinator

Meharry Medical College · Full-time

Jan 2022 – Present · 1 yr

Nashville, Tennessee, United States



Senior Academic Advisor/Disability Support Services Coordinator

Fisk University

Feb 2019 – Apr 2022 · 3 yrs 3 mos

Nashville, Tennessee



Non-traditional Educational Program Consultant, Department of Education

State of Tennessee

May 2018 – Sep 2018 · 5 mos

Greater Nashville Area, TN



Community Achieves Site Manager

Metropolitan Nashville Public Schools

Jul 2015 – May 2018 · 2 yrs 11 mos

Support Services, Nashville, Tennessee



Family Involvement Specialist

Metropolitan Nashville Public Schools

Jul 2012 – Jul 2015 · 3 yrs 1 mo

Department of Family & Community Partnerships, Nashville, Tennessee



Residential Assistant

Monroe Harding, Inc

Mar 2005 – Jul 2012 · 7 yrs 5 mos



Probation Officer

Metropolitan Government of Nashville and Davidson County

Sep 2004 – Jul 2012 · 7 yrs 11 mos

Juvenile Court, Nashville, Tennessee

DWAYNE H. TUCKER

Dwayne Tucker Consulting, LLC

9223 Old Smyrna Road

Brentwood, TN 37027

Voice: 214-923-7062

E-mail: dtucker615@gmail.com



QUALIFICATIONS SUMMARY

Senior executive with over 30 years of leadership experience driving P&Ls and creating long term success in Human Resources across small entrepreneurial and Fortune 500 companies. Specialties include business and human capital re-engineering, senior leadership management consulting, culture change leadership and strategy development, process improvement, total quality management, workforce and culture integration due to mergers and acquisitions.

SELECTED ACHIEVEMENTS

- Significant experience in establishing Board of Director and Compensation Committee strategy, governance and compliance related programs.
- Achieved double-digit revenue and profitability growth for transaction services business units.
- Successfully turned around three underperforming business units with combined revenues of \$400 million.
- Appointed by CEO to resolve a \$175 million breach of contract lawsuit; resolved without litigation or financial penalty paid by the company.
- Led the strategic design, re-organization and rollout of new operating model for the Utility BPO division resulting in double digit revenue and EBITDA growth.
- Implemented a consumer driven employer benefits cost containment strategy resulting in annual cost increases of 1 to 3 percent versus typical double digit annual employer cost increases.
- As Executive Sponsor, created an innovative leadership development and associate engagement strategy by designing & implementing a values driven culture.
- Completed M&A due diligence, negotiation and integration including synergy recommendations, cost modeling and development/implementation of integration plans for over 50 transactions.

PROFESSIONAL EXPERIENCE

DT Consulting CEO

2010 to present

A full service, leadership consulting firm. Area of consulting focuses are, executive coaching for senior executives; leadership acceleration of highest potential emerging leaders; executive team dynamics consultation; change leadership; colleague engagement and loyalty strategy; integrated human capital strategy and execution consulting.

ALLIANCE DATA SYSTEMS, Dallas, TX

1999 to 2010

Executive Vice President and President, Transaction Services - 2004 to 2010

Full P&L responsibility for Networks, Utility Services and Mail Services business units (\$400M in revenue) reporting to the CEO and Chairman of the Board of Directors.

Executive Vice President and Chief Administrative Officer - 2001 to 2004

Responsible for the strategy and execution of Human Resources, Information Technology, Public Relations, Marketing, Legal, Audit, Compliance, Risk Management and Facilities. Additional responsibilities included P&L accountability for Mailbox business unit and Credit Processing Centers. Interfaced with Compensation Committee of Board of Directors to establish executive compensation strategy and benefit plans for the company.

Senior Vice President, Human Resources and Administration - 1999 to 2001

Reporting to the CEO, responsible for Human Resources strategy, policy and practices, recruitment and retention, organization development, training and corporate communications including facility, public relations and administrative services.

NORTHWEST AIRLINES, INC., Egan, MN

1998 to 1999

Vice President, Human Resources

Reporting to the CEO, led the implementation of Human Resources strategy and policy for 54,000 airline associates. Re-engineered the HR function by centralizing recruiting, hiring and related activities. Developed strategic culture change plan for senior leadership team to improve employee engagement. Worked with Board of Directors establishing an executive compensation strategy and design.

FIRST DATA CORPORATION

1990 to 1998

Senior Vice President, Human Resources (Atlanta, GA) - 1996 to 1998

Led Human Resource strategy and policy for this \$2 billion business unit serving 15,000 employees in 132 domestic and international locations.

Senior Vice President, Healthcare Division (Brentwood, TN) - 1994 to 1996

Full P&L accountability for \$30M healthcare billing division. Responsible for general management of all business functions, sales, client services, human resources, operations, finance and MIS. Established separate lines of business to enhance management accountability and client focus.

Senior Vice President, Eastern Region Operations & HR (Phoenix, AZ) - 1992 to 1993

Created decentralized Human Resources organization to service \$100 million business unit. Implemented universal compensation and benefits programs across three separate business units.

Vice President, Human Resources, Integrated Marketing Services (Omaha, NE) - 1991 to 1992

Responsible for all Human Resource functions for \$140 million division with nearly 4,500 employees located in nine geographically dispersed locations.

Director, Employee Relations (Omaha, NE) - 1990 to 1991

Maintained human resource support for 10 business units consisting of over 15,000 employees. Provided due diligence for significant corporate acquisitions.

TMT ENTERTAINMENT, INC., Nashville, TN

1984 to 1990

Chief Executive Officer

Founder and managing partner of multi-unit restaurant and entertainment business with annual sales of \$1.9 million.

NORTHERN TELECOM, INC., Richardson, TX

1980 to 1984

Vice President, Human Resources, Integrated Office Systems - 1982 to 1984

Directed all operations for marketing services division consisting of 8,000 union and non-union employees with annual sales of \$800 million.

Regional Human Resources Manager (Parsippany, NY) - 1981 to 1982

Established regional human resources organizations to support 8 sales/service offices.

Employee Relations Manager (Richardson, TX) - 1980 to 1981

Implemented 360 management training, succession planning, associate surveys and other engagement programs. Developed and administered company affirmative action plans.

COMMUNITY AND INDUSTRY

Arrowhead Holdco Company – Wilmington, DE Board Member (2017 – Present)

–

Tennessee State University Foundation Board – Nashville, TN – Board Chair (2012 – Present)

Lead Public Schools – Nashville, TN – Board Chair (2012 – Present)

Nashville Public Radio – Nashville, TN (Past)

Dallas County Community College District Foundation – Dallas, TX (Past)

Community Credit Union – Dallas, TX (Past)

Plano Symphony Orchestra – Plano, TX (Past)

EDUCATION

BA, Business Administration, Tennessee State University 1980

Carter Paine

CEO, Wayspring

Attracted by the opportunity to partner with a talented team working to solve the nation's opioid epidemic, Carter joined Wayspring as CEO in 2019. An experienced healthcare executive, Carter has spent his entire career in health services and IT working for and with companies that challenge the status quo and strive to improve health outcomes while eliminating waste in the healthcare system. Prior to Wayspring, Carter co-founded and served as President & COO of naviHealth, a Nashville-based care transitions and post-acute management business. He received his B.S. in Commerce from the University of Virginia and an MBA from the Wharton School at the University of Pennsylvania.

Dr. Bryan Fisher

Vascular Surgeon, TriStar Health

Doctor Bryan T. Fisher Sr. is a board certified Vascular surgeon and Physician Lead for Vascular Services for the HCA Tristar Division in Middle Tennessee. Uniquely qualified to address the challenges and solutions aimed at the delivery of high quality patient care, Dr. Fisher is consistently recognized by his peers as a caring professional and respected collaborative colleague in the local and international community.

Dr. Fisher graduated with honors from Tennessee State University and became a Ronald McNair and MARC Scholar. He was accepted into the UW Madison School of Medicine and Public Health, but deferred one year to teach elementary school at Belmont Elementary School in Woodbridge, VA. After medical school, Dr. Fisher completed a five year general surgery residency at The Ohio State University under Dr. E. Christopher Ellison. He then culminated his surgical training at Vanderbilt University under Dr. Thomas C. Naslund.

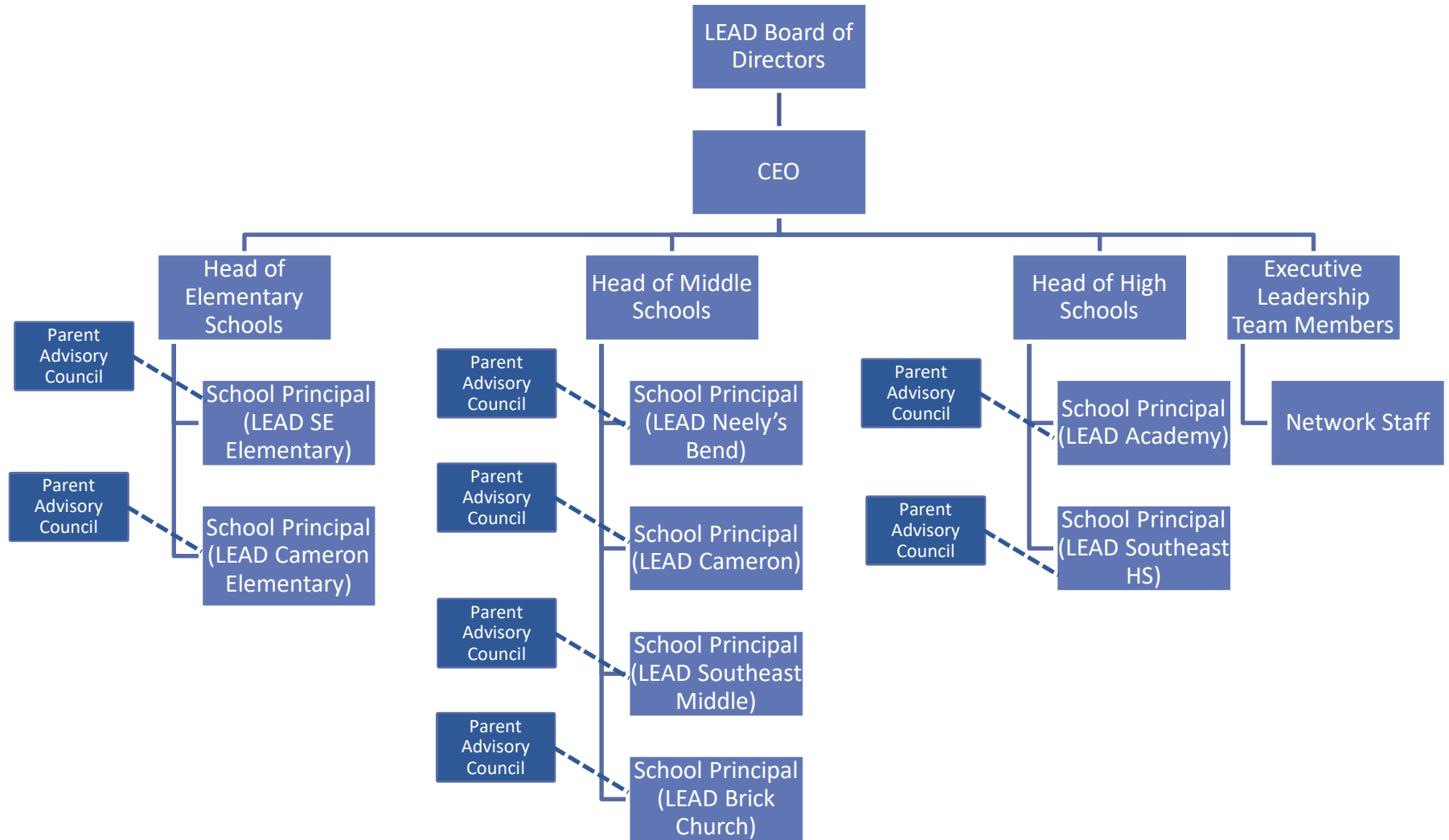
Dr. Fisher is a board certified Vascular surgeon and is a member of The Surgical Clinic in Nashville, TN. He serves as the Co-Chairman of the Tristar Vascular Workgroup, Physician Lead for Vascular Services HCA Tristar Division, and co-Director of the Center for Functional Limb Preservation at Tristar Centennial Medical Center. As the physician lead of Vascular services at the division level, Dr. Fisher provides leadership and the vision of providing cutting-edge, personalized, high quality care for vascular disease; in a truly collaborative environment. Dr. Fisher specializes in complex open, endovascular and hybrid techniques in the treatment of aortic disease and lower extremity occlusive disease. He has a special interest in the treatment of advanced lower extremity disease in patients at higher risk for limb loss. Dr. Fisher has an additional focus on eliminating disparities cardiovascular disease outcomes that adversely affect the Black community.

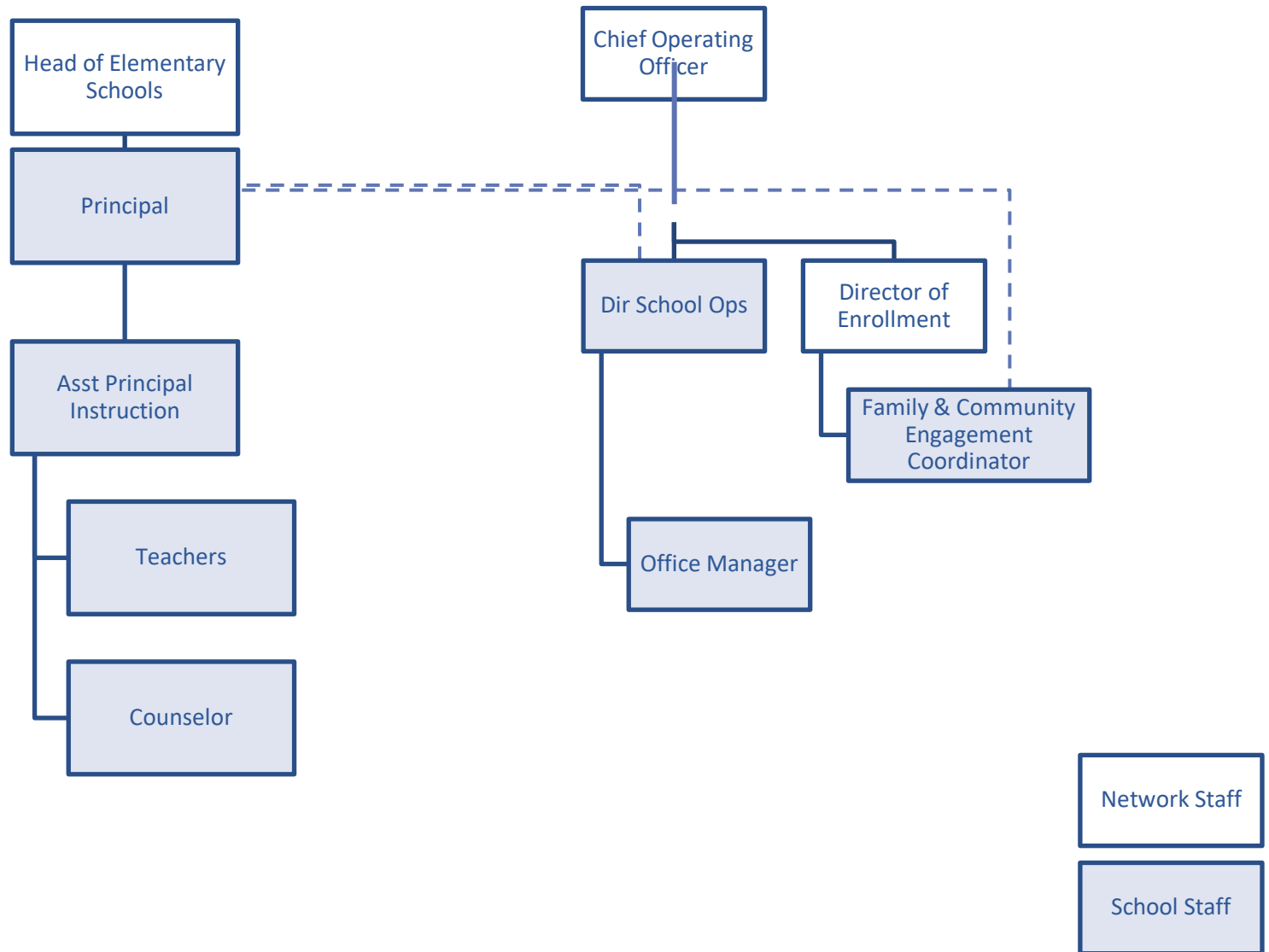
Dr. Fisher owes his success to his wife and friend of 21 years, Latita Fisher. They have four wonderful children (Bryan Jr., Breahn, Breya, and Brylee).

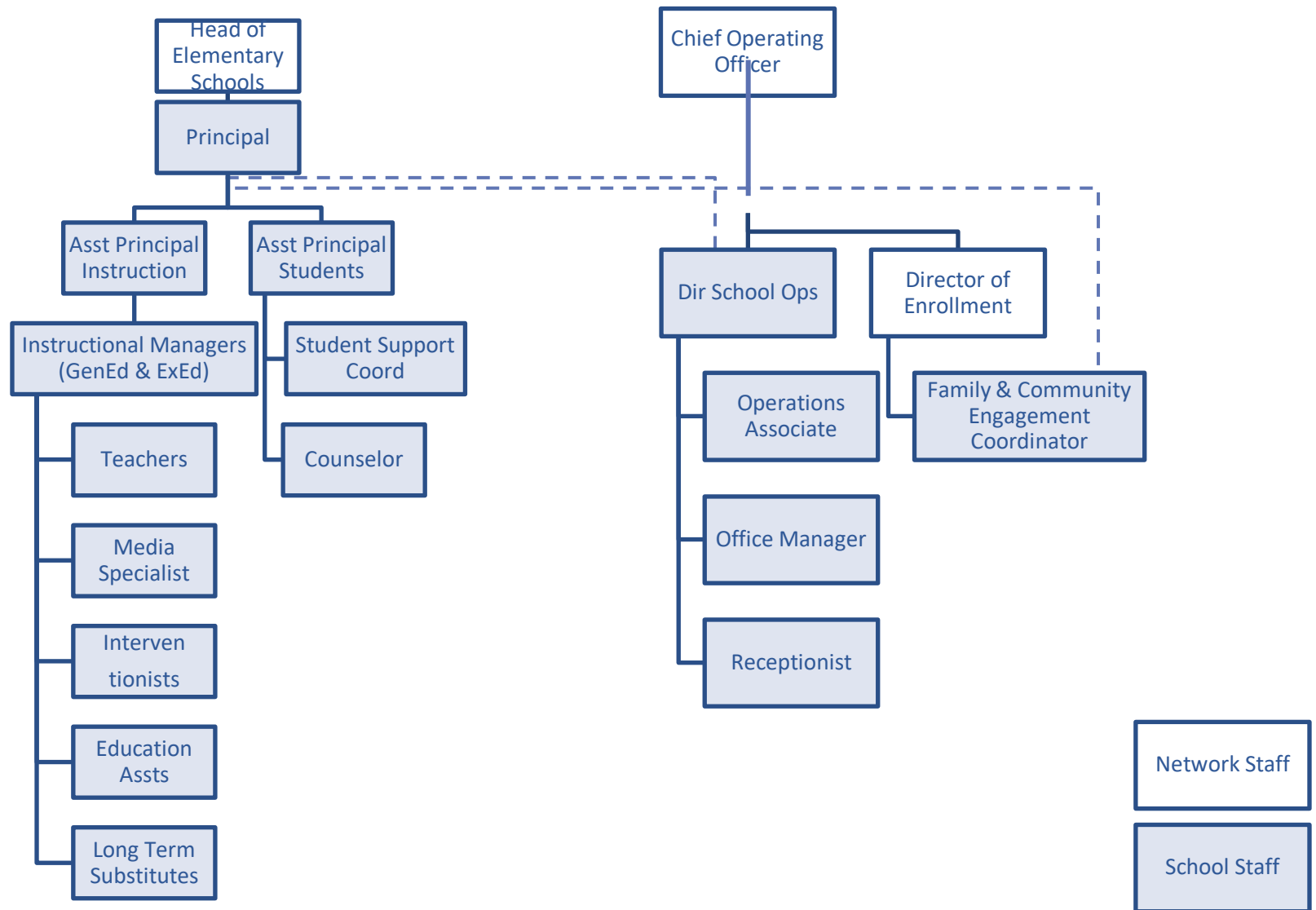
James J. Vesterman

Jim Vesterman is currently on the Board of Directors of Raptor Technologies, the world's leading provider of school security software. From 2012 to 2020, Jim was the CEO of Raptor Technologies, where he led the growth of Raptor from serving 7,000 schools in the United States to serving over 40,000 schools with an integrated suite of K-12 safety software. Prior to that, Jim founded the private equity search fund Liberty Place Capital in 2009 and used the fund to acquire Raptor Technologies in 2012. Jim began his career at Monitor Group, a global strategy consulting firm serving Fortune 500 firms, and Monitor Clipper Partners, a middle market private equity fund. Jim has served in senior operating positions in firms ranging from technology start-ups to Fortune 500 operating companies. Jim also served in the United States Marine Corps in the Special Operations forces and was awarded the Combat Action Ribbon and the Navy and Marine Corps Achievement medal for his service in Iraq in 2004. In 1998, Jim trained in classical marble sculpture in Pietrasanta, Italy. Jim graduated from Amherst College with his bachelor's degree and earned his M.B.A. from the Wharton School.

Org Chart: LEAD Public Schools, Inc Structure







DR. RICKI GIBBS II

234 Rosemary Way Mt. Juliet, TN 37122 ♦ 615-200-4525 ♦ ricki.gibbs@leadpublicschools.org

PROFESSIONAL SUMMARY

I am an innovative, highly skilled, and overtly student-focused educational leader possessing a strong commitment to the development of students, and staff, who seeks to provide a stimulating, safe, and motivating learning environment. I am a dynamic visionary leader and a solid team player with a proven track record in collaborating with the school community, increasing student academics, and maintaining excellence in education. I am a trustworthy professional with superior communication skills who strives to develop strong and lasting relationships with all stakeholders in education.

SKILLS

• Relationship building and networking	• Safety and security procedures
• Policy and procedure adherence	• Student achievement
• Common Core learning standards	• Policy development and enforcement
• Standards of excellence	• School administration
• Academic administration	• Team building
• Program development and management	• Training and mentoring
• Group facilitation and presentations	• Verbal and written communication

WORK HISTORY

Head of Schools Elementary, 06/2023 to Current

LEAD Public Schools – Nashville, TN

- Responsible for providing visionary and strategic educational leadership. This involves setting a clear and compelling vision for academic excellence, fostering a positive and innovative learning environment, and ensuring that all educational programs align with the school's mission and vision.
- Responsible for recruiting, developing, and retaining high-quality leaders for school. This includes providing ongoing professional development, mentoring, and creating a positive and collaborative work culture.
- Oversees the day-to-day operations of the school. This includes budget management, resource allocation, and ensuring that the school operates efficiently. They must also ensure compliance with relevant regulations and policies.
- Strategic Planning: As Head of Schools I play a key role in strategic planning for the school's long-term success. This includes setting goals, developing action plans, and regularly assessing progress towards achieving the school's objectives.
- Demonstrates adaptability, a willingness to learn, and the ability to lead the school through change.

Principal - Warner Arts Magnet Elementary, 12/2018 to 05/2023

Metro Nashville Public Schools – Nashville, TN

- Led Warner Arts Magnet from a Tennessee Value Added and Accountability System (TVAAS) Level 1 School (lowest rating) to a Level 5 (highest rating)
- Led a team of educators that moved the school from Priority Status to Reward Status (2022)
- Facilitated continued education for teaching staff through implementation of quality curriculum training and appropriation of necessary resources.
- Led comprehensive initiative to successfully re-culture and re-brand school as “Warner Arts Magnet” and "Warner Heroes and Scholars" incorporating both teacher and student efficacy as the core of school culture and climate where teachers are viewed as every day "Heroes" for changing lives through the power of a great education and students view themselves as academically capable.
- Implemented a non-traditional approach to address student discipline and suspension rate by incorporating mindfulness, breathing, and childhood yoga. This approach decreased student discipline referrals by 80% and out of school suspensions by 90%.
- Lead the turnaround at Warner Arts Magnet from a Level 1 school lowest in the state to a Level 5 school highest in the state.
- Lead Warner Arts Magnet to the highest percentage of students meeting their numeracy growth goals on the Measurement of Academic Progress (MAP) assessment in Metro Nashville Public Schools during the 2019-2020 school year.
- Established instructional practices driven through statistical performance data.
- Modeled expected and appropriate leadership to promote teaching staff and administrative personnel's positive interaction with students and families.
- Trained teachers on effective teaching techniques, classroom management strategies and behavior modification.
- Cultivated positive relationships between community members, school students and teachers.
- Researched and wrote proposals for educational grants.
- Mentored newly hired educators and provided encouragement and feedback.
- Defined and enforced student academic achievement standards in line with district goals and objectives.
- Prepared school budget and submitted to school board with recommendations for hiring, capital expenditures and cost-saving initiatives.
- Established positive, stimulating learning environment for students and exciting education-focused setting for teachers.
- Coordinated yearly operations and staff budget including Local Funding, Title 1 Funding as well as the Magnet School Assistance Program Grant (MSAP), tracked expenses and documented actions.

Principal - Glengarry Elementary, 08/2015 to 07/2018

Metro Nashville Public Schools – Nashville, TN

- Led staff in the development and implementation of language acquisition instruction to increase student achievement at a school where 65% of students were active English Language (EL) Learners.
- Led the school out of the bottom 10% of schools in the state of Tennessee based on student performance on the state accountability assessment (TNReady).
- Collaborated with district leadership to develop instructional strategies based on researched best practices in language acquisition and proficiency levels.
- Recruited, developed and retained teachers to ensure every child received instruction from a high quality teacher.
- Built capacity of teachers and instructional coaches to implement a rigorous literacy curriculum at a school serving students from low-income families and yielded an end of the year proficiency rate of 60% of students reading at or above grade level. This was an increase from 44% from the previous year before my leadership.
- Effectively utilized data analytics to create strategies that addressed student-learning gaps through a collaborative planning model that resulted in a 16% increase of reading scores from previous year.
- Developed accountability using strong data practices for both students and teachers that resulted in an increase in achievement based on individual goals.
- Used Gallup Strengths with staff to create strong systems and structures to organize and maximize teams for collaborative work.
- Led team of teacher leaders in developing strategic initiatives and action plans to support student achievement growth and interventions for students learning English as a Second Language and students from improvised backgrounds.
- Created and implemented instructional cycles to build leadership capacity in coaches to informally observe, coach, model, and conference with teachers leveraging their strengths.
- Developed community partnerships with the Nashville Ballet, Kroger Grocery Store, United Parcel Service (UPS), Piccadilly Restaurant, and Olive Branch Church.
- Demonstrated exceptional fiscal management and leadership skills, understanding of district Student Based Budgeting process and managing fiscal resources to ensure program integrity.
- Collaborated with Parent Teacher Organization (PTO) to increase parental involvement within two years and hosted parent workshops and monthly family music programs to engage parents in the instructional program.
- Demonstrated ability to build relationships with parents, students and teachers to maintain effective communication through monthly newsletters, electronic callout system and other social media tools.

Assistant Principal, 07/2010 to 06/2015

Metro Nashville Public Schools – Nashville, TN

3rd Grade Teacher, 02/2006 to 05/2010

Metro Nashville Public Schools – Nashville, TN

EDUCATION & CERTIFICATIONS

Doctor of Education: Organizational Leadership and Strategic Change, 12/2017

Lipscomb University - Nashville, TN

Master of Education: Administration and Supervision, 05/2007

Tennessee State University - Nashville, TN

Bachelor of Science: Elementary Education K-8, 12/2005

Tennessee State University - Nashville, TN

Aspiring Superintendent Academy AASA: 04/2022

AWARDS & AFFILIATIONS

- 2023 Tennessee Distinguished Administrator awarded from The Tennessee Educators Association
- 2019-2020 Metro Nashville Public Schools Principal of the Year
- Member, Alpha Phi Alpha Fraternity Inc. 2003 to Current
- Member, Magnet Schools of America 2018 to Current
- Member, Metro Nashville Education Association, 2006 to Current
- Member, Tennessee Principals Association, 2016 to Current
- President of the Board for Educators Cooperative
- Member, Magnet School of America Legislative and Policy Work Group
- Member, Board of Directors Council for the Accreditation of Teacher Preparation (CAEP), 2016 to Current
- Member, Instructional Professional Development Commission, 2007 to 2012
- Member of the rubric and assessment committee that designed a scoring instrument for a proposed Tennessee Teacher Professional Life Cycle through the Tennessee Education Association
- Member of the Instruction and Professional Development (IPD) Commission with the Tennessee Education Association aimed to create professional development opportunities for teachers across the state of Tennessee
- Member of the Differentiated Roles and Responsibilities committee for Achieving Student Success through Effective Teaching (ASSET) team for Metropolitan Nashville Public Schools
- School Turnaround work was featured on the podcast “The Promise Season 2” which was recognized as a top 5 podcast of 2020 by the New Yorker and was nominated for a Peabody Award

REFERENCES

Ms. Sandra Moorman

Principal, Tom Joy Elementary

615-969-6652

sandra.moorman@mnps.org

Ms. Renita Perry

Chief of Innovation, Metro Nashville Public Schools

901-206-9366

renita.perry@mnps.org

Dr. Lisa Coons

Chief Academic Officer, TN Department of Education

615-210-7560

lisa.coons@tn.gov

Stephanie Jarrett-Thorpe
7488 Maggie Dr Antioch, TN 37013
sncjthorpe@gmail.com
301-512-8060

Summary

Experienced leader and coach with expertise in working at the intersection of schools and community. My focus is holistic stakeholder engagement working to mobilize scholars, staff, families and community partners toward our collective goals. As an executive coach, I model using a variety of practices to analyze quantitative and qualitative data to inform strategy. I work with teams to maximize the impact of their work through integrating departments in order to create concentric circles of support to meet the evolving needs of today's scholars, staff, and families.

Professional Experience

LEAD Public Schools, Nashville, TN **Founding Principal**

October 2023- Present

- Support the Head of Elementary Schools with strategic and operational planning for a new division of elementary schools in the LEAD Public School network in preparation to lead one of the schools
- Collaborate with members of the elementary division team to draft documents, policies, recruit staff, and attend ongoing professional development related to preparing for the launch of the new schools
- Serve as a member of the school and instructional leadership team for LEAD Brick Church Middle School as reading intervention instructional manager
- Coach and provide targeted professional development for a team of 5 early professional (0-3 years experience) reading intervention teachers
- As a result of intensive coaching on reading comprehension strategies, 64 students, representing 25% of the total student population, grew one or more levels in reading intervention by mid-year testing as measured by FastBridge progress monitoring. 20% of all students in reading intervention moved into Tier I instruction by mid-year

CT3 Education, San Francisco, CA (Remote) **Managing Associate**

October 2021-September 2023

- Deliver dynamic executive leadership and instructional coaching to school leaders in various regions of the US leading principals to driving growth on state accountability metrics in school districts in Washington, DC, Missouri, Mississippi, and Ohio
- Coordinate and enhance projects assigned by the Chief Program Officer in order to support program development, revision, implementation, and data integrity
- Coach and manage a team of five Associates by providing supervision, performance management, and advocacy for their interests and professional needs as a member of our Leadership Team
- Develop and deliver relevant in-person and virtual leadership workshops to school and district leaders on common problems of practice with a 98% overall satisfaction rate from participants
- Analyze data and develop actions plans using Salesforce, Torsh, and Domo platforms to manage external partner and internal performance data
- Frequently collaborate with the Business Development Team (Sales/Marketing department) to develop employee and partner engagement campaigns leading to a 200% increase in social media traffic during Teacher Appreciation week

Stephanie Jarrett-Thorpe
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sncjthorpe@gmail.com
301-512-8060

Explore! Community School, Nashville TN
Executive Principal

June 2018-September 2021

- Spearheaded an aggressive, strategic growth campaign of a progressive project based learning school in East Nashville TN, increasing student enrollment 71% from 280 to 480 students from August 2018 to August 2019
- Drove an intensive shift in curriculum and coaching strategy which led to the school being celebrated as a Rewards School for the state of TN for growth and achievement in SY21-22
- Excelled in stakeholder management by creating compelling monthly presentations for our board of directors, Family Advisory council, and staff which lead to development outcomes of ~\$180K per year from private donors and 50% of staff hires were referrals from staff or other school stakeholders
- Advanced diversity practices through targeted recruiting at all student, staff, and partnership levels which lead to an increase in diverse staff representation by 30% in instructional and leadership roles
- Effectively managed a \$6M budget including reporting of funds from a variety of Federal and state grant programs
- Spearheaded the implementation of integrated social-emotional learning as a part of a restorative discipline overhaul which was recognized by Kickboard Inc. for our use of the data as a universal screener for social-emotional interventions during the Pandemic

Nashville Academy of Computer Science, Nashville TN
Principal

June 2017-June 2018

- Intentionally integrated the implementation of the instructional, operational, and school culture programming at NACS for grades 5-8 to build shared ownership among students and staff
- Piloted a shift in leadership to each grade level to increase the impact of instructional coaching and deepen relational trust between leaders, teachers, students, and families which led to a 22% decrease in suspensions
- Charged a curriculum shift for math teachers to using shared curriculum, which increased unit assessments scores to being among the highest across the network of four middle schools in Nashville and Jackson, MS
- Empowered teacher leaders to propose, design, and implement school wide instructional and cultural enrichments (lunch tutoring, support for Tier 2/3 scholars, enrichment clubs, mock trial, Poetry Slam, Black History program, SGA, etc.)

Democracy Prep Congress Heights, Washington DC
Principal

July 2014-June 2017

Assistant Principal

Building Excellent Schools Emerging Leader

LeaderU-Leadership Fellow/Acting Academy Director

- Provided instructional and school culture leadership to for a team of 70 teachers, coaches, and support team members grades K-7
- Lead the Family/Community Engagement Leadership Team via a partnership with Flamboyant Foundation which resulted in our school getting 4.4/5 for parent satisfaction on EOY home/school partnership survey
- Executed new accountability systems aligned our school instructional growth framework which led to us being in the top five schools in our Ward for math growth in our second year of PARCC administration
- Earned certification of leadership training from the *Building Excellent Schools Emerging Leaders* program to study best practices in some of the highest performing charter schools across the nation

Cesar Chavez Parkside Middle School Washington, DC

August 2011-June 2014

Assistant Principal

- Provided individual and small group instructional coaching to teachers which led to an 80% retention rate for teaching staff for SY 2013

Stephanie Jarrett-Thorpe
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sncjthorpe@gmail.com
301-512-8060

- Developed and revised system wide vertically aligned middle school math curricula and interim assessments aligned to the Common Core State Standards
- Developed and implemented school wide formal professional development from SY2012-SY2014, and led the formation of differentiated professional learning communities
- Led the Parkside Instructional Support (RTI) program for school year 2011-2012 which led to 75% of students receiving intervention showing academic growth in collaboration with *Turn Around for Children*

Community Based Coach

March 2010-Present

- Coach and give technical assistance for school leaders seeking to partner with nonprofits, businesses, and other community based groups
- Write proposals, letter of interests, and business related documents to help entrepreneurs define/refine the scope of work and align program and budgets to client need
- Certified as National School Reform facilitation coach, trained in cognitive coaching, and data driven coaching methods
- Support emerging non profit with planning and getting initial approval for 501c3 status
- Serve as a community connector in the DMV, Nashville education/arts community

Education

B.S. Marketing-Morgan State University, Baltimore

M.S. Educational Leadership and Administration*-Trinity University DC

*In partnership with New Leaders Principal Endorsement

ASHLEY WIECKIEWICZ, M.S., BCBA

PROFESSIONAL EXPERIENCE

LEAD Public Schools

Director Student Services

Nashville, TN

October 2023-Present

- Foster behavior skills mastery for teachers implementing Tier III FBAs & BIPs through clear expectations of intervention implementation, modeling, frequent supervisory visits, and effective coaching practices with feedback for improvement.
- Provide verbal de-escalation to students in crisis, develop safety plans to minimize future crisis risk, and train staff on specific response procedures and coping techniques.

Metro Nashville Public Schools

Board Certified Behavior Analyst

Teacher

Nashville, TN

August 2018-October 2023

August 2015-August 2018

- Build capacity at the school level by training 9 school leadership teams on the MTSS-B process, modeling and coaching Tier II interventions, creating data collection and progress monitoring systems, and consulting with teams on analyzing data to drive decisions.
- Coach schools on the creation and implementation of RTI²-B (PBIS), analyze schoolwide behavior data, and ensure fidelity of implementation across staff, leading to 3 schools being named Models of Demonstration.
- Develop and conduct professional development on behavior analytic, trauma informed, and social emotional learning practices to support all tiers within the general education setting. Deploy various learning methods (e.g., online learning, videos, instructor led training) to meet the needs of staff.
- Assess challenging behavior through analytic methods, develop equitable behavior intervention plans to target socially significant behaviors, and monitor progress of over 60 students on caseload.
- Collaborate quarterly with cross-functional teams to meet district key performance indicators (KPIs) by analyzing district data, identifying problem areas, and proposing solutions.

Teach for America

Educational Consultant

Teacher

Tulsa, OK/ Nashville, TN

June 2015-July 2017

May 2013-August 2015

Coached 15 classroom teachers to develop efficacy that ensured curriculum alignment, effective teaching practices, high levels of student achievement, and teacher reflection. Selected as Oklahoma's Regional finalist for the Sue Lehmann Fellowship for inspiring students to achieve high outcomes and creating a collaborative environment between teachers, students, and parents. Received highest Value-Added scores in 2013 and 2014 based on student NWEA MAP growth.

Groupon

Senior Account Manager

Account Manager

Account Executive

Chicago, IL

January 2012- May 2013

April 2011- December 2011

September 2010- March 2011

EDUCATION & CERTIFICATIONS

Lipscomb University

M.S. in Applied Behavior Analysis

Board Certified Behavior Analyst Certification #1-18-32554

Nashville, TN

May 2018

Indiana University

B.A. in Journalism

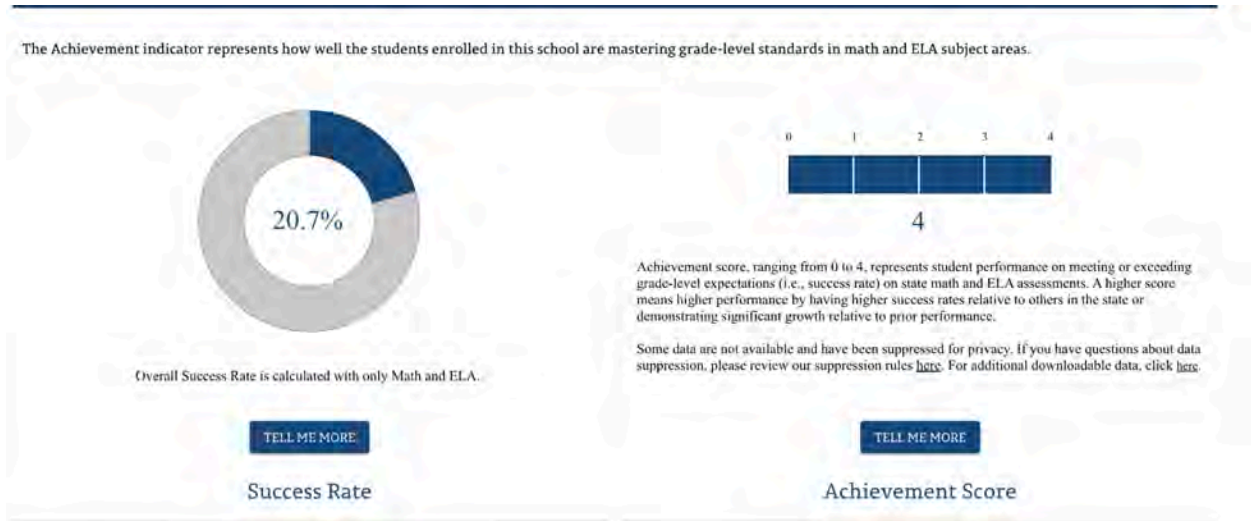
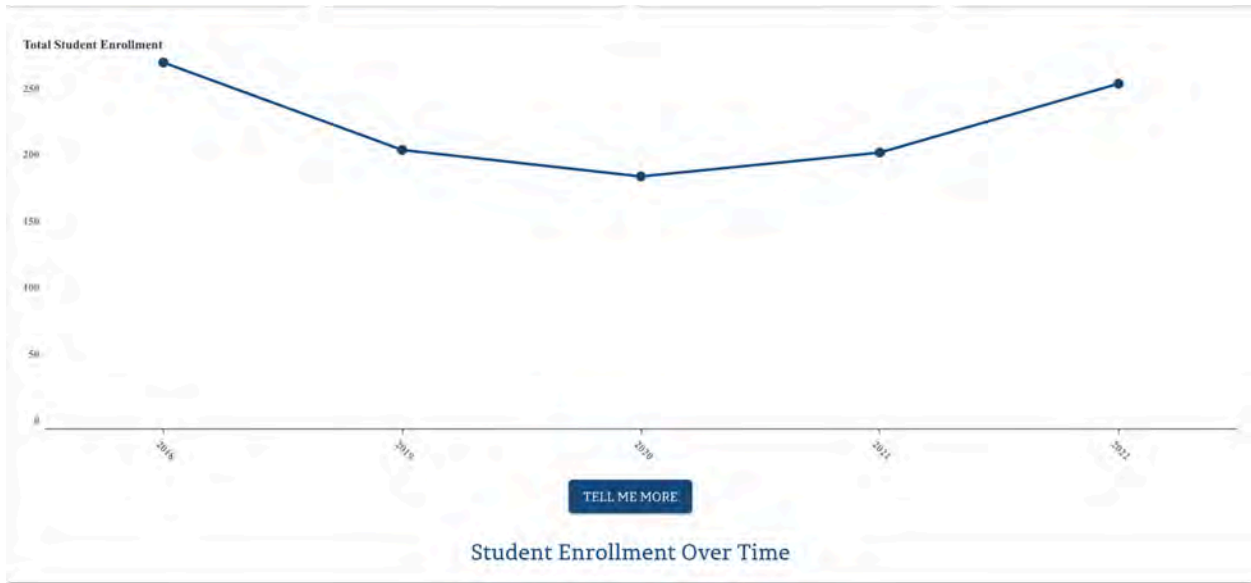
Minor: Business

Bloomington, IN

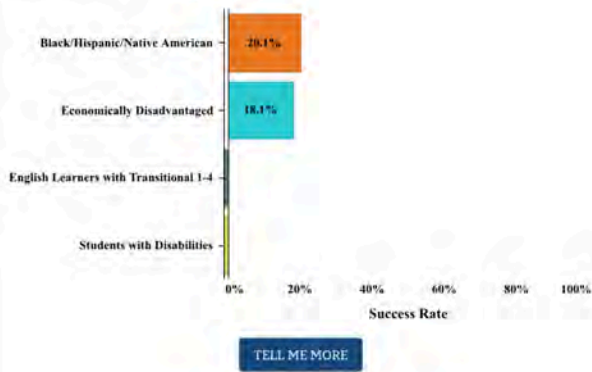
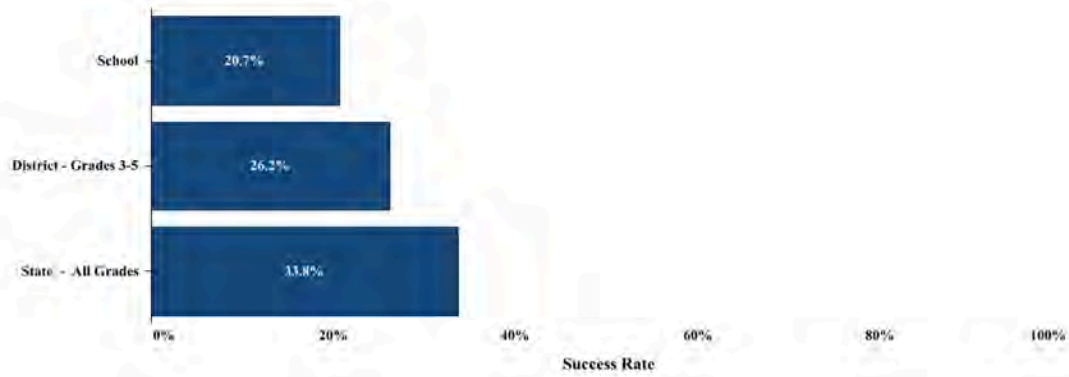
May 2010

Warner Elementary (Dr. Ricki Gibbs)

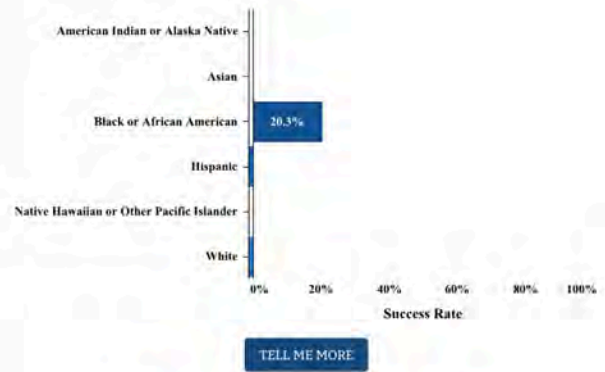
Dr. Ricki Gibbs currently serves as the Head of Elementary Schools for LEAD Public Schools. Dr. Gibbs previously served as the Principal at Warner Elementary. During his leadership, the school saw significant increases in academic results and school culture metrics. See below for the most recently released report card for Warner Elementary.



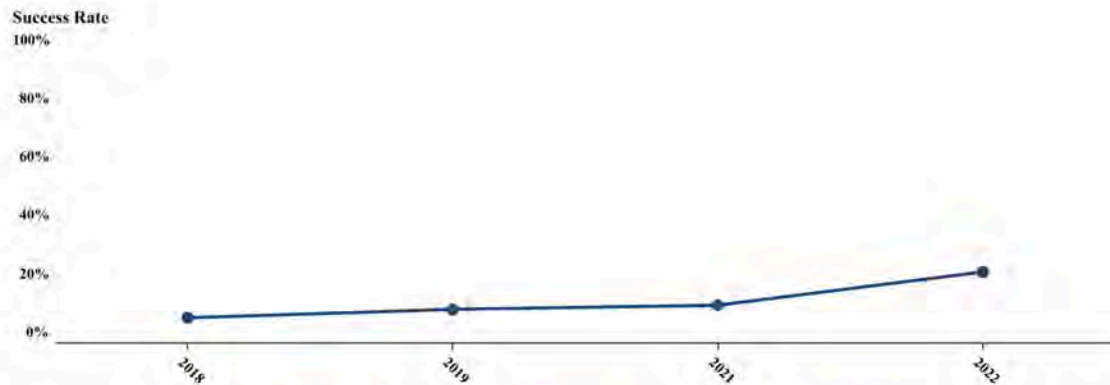
R. Student Achievement



Success Rate by Student Group



Success Rate by Race/Ethnicity



To protect student privacy, data may be omitted in this graph where n-counts are low. Please see the [rules](#) for when and how data is suppressed.

[TELL ME MORE](#)

Success Rate Over Time



Employee Manual

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ABOUT LEAD PUBLIC SCHOOLS

Welcome to the LEAD Community! We pride ourselves on our unique spirit of teamwork and community that exists on our campus. LEAD was founded on this spirit and our ability to build and maintain strong relationships with all stakeholders in the school has been an important ingredient in our overall success. Students and staff at LEAD treat and rely on one another as family and value each other as individuals.

Employees are expected to make themselves available to fellow employees, students, and their families in order to work in the best interest of our students and school. While many other schools are marked by instructors and leaders closing the door during the day and isolating themselves from their colleagues, employees at LEAD work in a collaborative manner to reach our ambitious goal of success in college and in life for every one of our students.

As part of that community, it is important for all employees to familiarize themselves with our Mission and Ethos.

LEAD Mission

LEAD Public Schools prepares all our students with the knowledge and skills to succeed in college and in life.

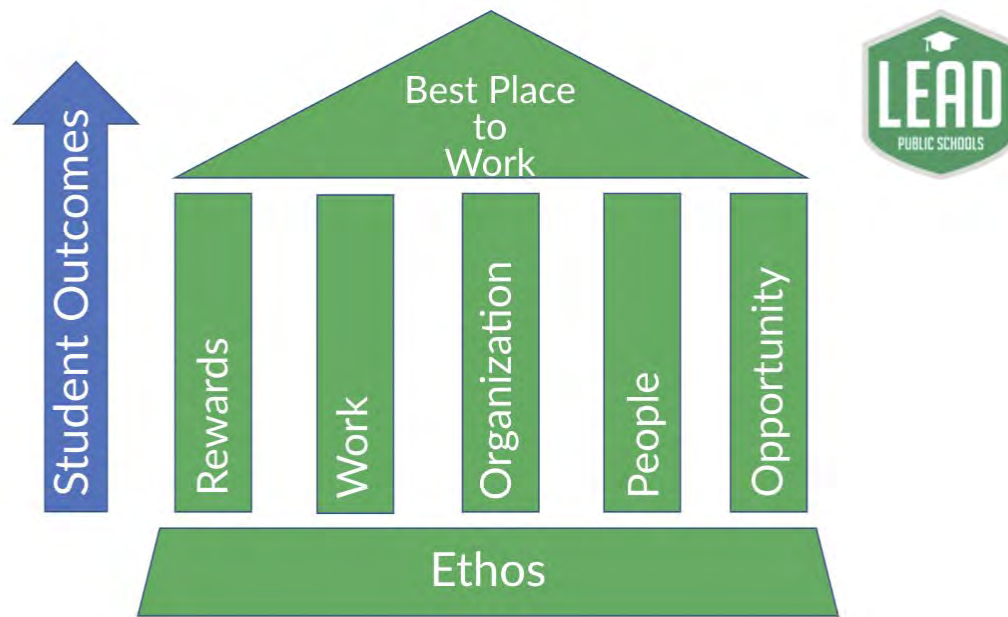
LEAD Ethos

I LEAD because:

- I am Courageous
- I am Self-Reliant
- I am Disciplined
- I am Committed
- Serve Others

LEAD Employee Value Proposition

Our employee value proposition is tied to our Ethos where Rewards, Work, Organization, People, and Opportunity produce Student outcomes which in turn makes LEAD Public Schools the Best Place to Work in Nashville.



Opportunity includes development opportunities and professional growth.

Work includes alignment between individual interests and work content, as well as work-life balance.

People includes the quality of coworker relationships, quality of leadership, and the team.

Organization includes mission and purpose, and reputation.

Rewards includes compensation, benefits, and paid time off.

UNDERSTANDING THE HANDBOOK

Purpose of this Handbook

Welcome to LEAD! This handbook is designed to acquaint you with our general personnel policies and practices and to summarize the key elements of the LEAD employment experience. It is designed to provide a general understanding of our personnel policies and to answer many of your questions about employment with LEAD Public Schools (LPS).

However, it is not intended to be an all-inclusive source of information and LPS may modify these policies. Modifications will be made only by the Chief Human Resource Officer and CEO;

no statement or promise by any other staff person may be interpreted as a change in the policies in this handbook. Unless otherwise indicated, this handbook supersedes all previous written or verbal policies. Neither this handbook nor any of its provisions create an expressed or implied contract of employment.

“At-Will” Employment

All positions at LEAD Public Schools are at-will. Either party can terminate the relationship at any time with or without cause and with or without notice.

Employee Classification

In order to understand benefits and leave packages, employees will want to make sure they understand which policies apply to their position and how they are classified. When a new employee is hired, or when an employee moves to a new position, the employee will be classified into one of the following categories based on their method of compensation, hours scheduled to work, and responsibilities.

As responsibilities change, an employee’s classification may be changed by the Chief Human Resource Officer and employee’s manager.

All positions are classified into the following categories:

Position Classification	Employee Groups
Certified	Positions requiring a teaching certificate: • Teachers
Support	Positions not requiring a certificate, such as: • Principals • Assistant Principals • Counselors • Education Assistants • Operations Managers • Office Managers and Office Staff • Nest Staff

All employees are classified into the following categories:

Classification	Pay	Benefits Eligibility	Paid Time Off	Hours
Full Time Salaried	Salaried	Eligible for Benefits	Eligible	Scheduled to work 30 hours per week or more
Part Time Salaried	Salaried	Not eligible for Benefits	Eligible for PTO on a prorated basis	Scheduled to work less than 30 hours per week
Hourly	Hourly Rate	Not eligible for benefits	Not eligible for PTO	Must consistently work less than 30 hours per week

Calendar Year vs. School Year Distinction

LEAD also classifies staff as School Year and Calendar Year employees. This distinction influences an employee's paid time off (please see the Paid Time Off section for more details). Please see the table below for a breakdown of Calendar Year vs School Year.

Classification	Position (examples)	Definition
School Year	• Teacher • Student Support Coordinator • Education Assistant • Counselor	Employees who only work during the school year and are deemed School Year employees
Calendar Year	• Principal • Assistant Principal • Instructional Manager • Office Manager • Director of Operations • NeST Staff	Employees who work the full calendar year and are deemed Calendar Year employees

Certification

Employment for teachers is contingent upon successful completion of a background check, completed reference check, and proof of valid and active certification in the state of Tennessee within 90 days of employment. Failure to obtain your Tennessee teaching license within 90 days of employment may result in termination.

To maintain acceptable standards of care, certain occupations may require licensure, certification or registration. If you are hired in a position or job classification that requires licensure, certification or registration you must present original documentation showing current licensure or eligibility at the time of your hire and thereafter, according to timeframes established by the appropriate licensing agency. A copy of this documentation must be uploaded in your personnel file in ADP. You must notify your manager immediately of any change in your licensure (initial TN license, renewal of TN license, advancement of TN license), certification or registration status. In addition to notifying your manager, you must upload a copy of the license to your employee documents in ADP. Compliance with this policy is a necessary condition for continued employment.

GENERAL INFORMATION AND PRACTICES

Hours

Hours are set by the manager. Employees are encouraged to discuss work hours with their manager in the first week of employment.

Inclement Weather Policy

Generally, LEAD follows MNPS cancellation policies. During inclement weather, check local news stations for information regarding cancellation policies. Unless otherwise noted, LEAD will be closed when MNPS is closed. When LEAD is closed for inclement weather, all LEAD employees are not expected to fulfill their duties from home. If an employee fails to come to work when school has not been canceled, the employee must use any available accrued paid time off.

In the event of other emergency closures, management will communicate work expectations to employees as soon as possible.

Equal Employment Opportunity

LEAD Public Schools does not discriminate on the basis of race, religion, creed, gender, gender identity, sexual orientation, national origin, color, veteran status, age and/or disability in admission to, access to, or operation of its programs and activities. LEAD Public Schools does not discriminate in its hiring or employment practices and complies with federal and state regulations for implementing Title IX of the Education Amendment of 1972, Title VI, Section 504 of the Rehabilitation Act of 1973 and Americans with Disabilities Act (ADA) 1990.

LEAD has adopted grievance procedures for filing, processing, and resolving alleged discrimination complaints concerning discrimination complaints concerning discrimination based upon race, color, religion, national origin, sex, age, disability, and veteran status. Any person who believes s/he has been discriminated against based upon one of these protected categories is encouraged to file a discrimination complaint.

Employees with Disabilities

LPS is committed to complying with all applicable provisions of the Americans with Disabilities Act. LPS does not discriminate against any employee or job applicant who is a qualified individual with a disability on the basis of his/her disability or perceived disability in all job application procedures, hiring, firing, advancement, compensation, job training, and other terms, conditions and privileges of employment.

LPS is committed to nondiscrimination and supports the employment of qualified individuals with disabilities in our workforce. It is the responsibility of an employee to request an accommodation of his or her physical or mental disability by contacting the manager and Human Resources. LPS will determine whether the employee is a qualified individual with a disability and whether a reasonable accommodation is possible that would allow the employee to perform the essential functions of the job without imposing an undue hardship on LPS or other employees.

Personnel Records

All personnel records are the responsibility of the Human Resources. Access to personnel files will be given only to those authorized people within LEAD who have a legitimate business need

to review them. All medical files will be kept separately, in accordance with HIPAA. Submit records requests to hradp@leadpublicschools.org.

ADP – Employee Information Update

If you have an address or personal contact information change, you should ensure that timely updates are made within ADP.

Please ensure that your personal information is updated in ADP. This information is very important when we begin to send out Tax documents, important for any Retirement accounts you may have with LEAD, and **COBRA** information to be sent out, if applicable.

You can make the updates in ADP by going to workforcenow.adp.com. After you log in: go to **Myself, My Information** and **Profile**. On the left-hand side under **Personal Info** click **View More** and scroll down to the address section. **In ADP: Please verify your:**

Physical Address, Personal email address and contact number

Former employees will have access to ADP through adp.com to obtain a copy of their W-2 form electronically when they are available. Please follow the steps below to review your options and elect to receive your W-2 electronically.

Myself > Pay > Annual Statements 1. On the Annual Statement page, click **Go Paperless**. 2. Select **Access my Annual Statements online only** check box and click **Next**. 3. Read the information, click **I Agree**, and click **Next**. 4. Enter the confirmation number, and click **Next**. 5. Click **Done**

If you have any questions, please feel free to contact the Human Resources by email at hradp@leadpublicschools.org.

Employment Verification/References

LEAD Public Schools contracts with an outside vendor to handle employment verifications for current and former associates. The Work Number is a service that provides our Company with an automated process. It allows employees to have their employment and salary verified within a matter of minutes. This fast, secure service is used for mortgage applications, reference checks, loan applications, and apartment leases; anything that requires proof of employment. For additional information on how to use the system, contact The Work Number client service center at 1-800-996-7566.

www.theworknumber.com

Provide Company Code: 119585

Provide Your Social Security Number

No LEAD employees should verify any employment information or provide a reference unless approved by Human Resources. Our policy is to release only the dates of employment and job title and to verify salary, and not to release or verify any additional information.

Personal Property

LPS is not responsible for and will not reimburse employees for lost or stolen personal property. Unless an employee's Manager requests that s/he bring her/his property to LPS for work related purposes, LPS cannot and will not be responsible for it. Personal items like I-Pads, digital cameras, laptops, jewelry, etc. should be left at home. If an employee must have items of personal property at work, it is requested that employees keep them on their person at all times while on LPS premises.

EMPLOYEE CONDUCT

Role Model Policy

Every Employee is a Role Model for the youth attending LEAD. Regardless of the position an employee may hold within LEAD, every LEAD employee, volunteer and contracted employee must recognize that we are all role models for the youth we serve. As such, our behavior, both on the job and when in the public eye, must be consistent with our goal of providing positive role models to all our youth. This includes but is not limited to acting, speaking and conducting oneself in a professional manner with a courteous attitude.

It shall be the continuing policy of LEAD to be intolerant of any behavior that negatively impacts the employee's ability to serve as a positive role model or which otherwise compromises the LEAD philosophy, the integrity of its models of care, or its credibility with students, their families and the public. LEAD will carefully and thoughtfully investigate charges of inappropriate behavior and will impose appropriate disciplinary sanctions, up to and including the termination of employees whose conduct is found to be detrimental to their roles as positive models for student behavior.

Positive Role Model Definition

LEAD Public Schools defines a Positive Role Model as such:

- A positive role model recognizes that one's conduct is an informational base for student behavior.

- A positive role model is one whose own behavior at all times demonstrates the appropriate behaviors and attitudes we seek from the child/youth in our care.
- A positive role model is one whose own behavior is absent from any illegal conduct.
- A positive role model demonstrates self-respect and respect for their co-workers and youth in our care.
- A positive role model is one whose own behavior is absent of conduct which violates any of the following:
 - Sexual and Harassment Policy
 - Child Abuse Policy
 - Substance Abuse and Drug-Free Workplace Policy
 - Any program or facility policy which serves to define or delineate staff/student relationships.
- A positive role model is one whose own behavior (including social media presence), even if away from students or work, is such that if it became public knowledge or known to students it would not undermine, diminish or limit the relationship with youth or have the potential to negatively impact the behavior of youth. This is particularly true of social media use.

Response to Allegations of Inappropriate Behavior

LEAD employees are required by this policy to immediately report to their direct manager, the Director of Human Resources, or any other member of management with whom they feel comfortable any action initiated, observed, or learned of, that constitutes, or may constitute inappropriate behavior. This includes any procedure, practice or ethical standards of LEAD and the human services profession. Management is required to ensure filing of appropriate state reports if applicable. In the event a charge of inappropriate behavior is made, all allegations shall be carefully and thoughtfully investigated internally and reported to the appropriate Director of Human Resources and, if the alleged activity may also be illegal, to the appropriate local, state or federal authority.

Legal Consequences: If an employee engages in illegal actions described herein, law enforcement authorities shall be called and one is subject to being charged under appropriate local, state or federal laws.

Employment Consequences: Violation of this policy, either by misconduct or by failure to report as required, constitutes a major policy violation and may subject the employee to discipline, up to and including termination for the first offense.

LEAD Public Schools takes the Role Model Policy very seriously. Employees should only sign and acknowledge this manual after having received clarification of any part of the Role Model Policy not understood. No employee shall be permitted to have contact with students until the employee understands and has signed the employee manual acknowledgement. Refusal to sign shall constitute cause for discharge from employment.

Harassment Policy

It is LPS policy that all employees are responsible for assuring that the workplace is free from all forms of harassing behavior. Harassment may consist of unwelcome conduct, whether verbal, physical, or visual, that is based on a person's race, color, religion, sex, sexual orientation, age, national origin, ancestry, disability or other legally protected status. LPS will not tolerate harassing conduct that creates an intimidating, hostile, or offensive work environment, that interferes unreasonably with an individual's work performance, or that affects job benefits.

Because of LPS's strong disapproval of offensive or inappropriate sexual behavior, all personnel must avoid any action or conduct which could be viewed as sexual harassment. Sexual harassment may include unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- Submission to such conduct is made either explicitly or implicitly a term or condition of employment; or
- Such conduct has the purpose or effect of creating an intimidating, hostile, or offensive working environment.

To maintain a harassment-free workplace, the following conduct is prohibited:

- Verbally abusing or "kidding" that is related to one's race, color, religion, sex, sexual orientation, age, national origin, ancestry or disability and considered unacceptable by another individual. This includes comments about an individual's body or appearance/clothing (where such comments go beyond mere compliment), off-color jokes that are clearly unwanted or considered offensive by others, or any other tasteless comments or innuendoes.
- Creating a work environment that is intimidating, hostile, abusive, or offensive because of the display or circulation of offensive written materials (including electronic mail), unwelcome conversation, suggestions, requests, demands, physical threats, or physical contacts.
- Threatening or insinuating that an employee or applicant should submit to sexual advances or that refusal to submit to sexual advances will adversely affect employment, including evaluation, wages, promotional opportunities or work tasks.

- Giving favorable treatment in any way to an employee or applicant because that person has shown a willingness to perform sexual activities.
- Making unwelcome or unwanted sexual advances. This includes patting, pinching, brushing against, hugging, cornering, kissing, fondling, or any other similar physical contact considered unacceptable by another individual.
- Displaying sexually suggestive objects or pictures, including nude photos, in the workplace.
- Classroom assignments or classroom discussion that is racist, sexually explicit or otherwise discriminatory without a legitimate academic purpose.
- Any other harassing conduct that would unreasonably interfere with another's work performance.

Any employee who has a complaint of harassment or who has witnessed harassment by anyone at LPS (including manager, co-workers or visitors) must bring the problem to the attention of their manager, the Director of HR, or any other member of management with whom they feel comfortable. Retaliation against an employee for bringing a complaint is prohibited. Violation of this prohibition against retaliation may result in discipline up to and including termination.

All complaints will be investigated promptly and thoroughly and appropriate action will be taken to the extent reasonably possible. Confidentiality with respect to reports and related investigations will be maintained. LPS will retain confidential documentation of all allegations and investigations and will take appropriate corrective action, including disciplinary measures when warranted up to and including termination, to remedy any violation of this policy.

Consensual Relationships in the Workplace

LEAD Public Schools requires employees to notify their manager and Director Human Resources if they are in a romantic relationship with another employee. In accordance with the Sexual Harassment Policy, romantic relationships must be entirely voluntary and consensual, may not have a negative impact on the working environment, and both employees in the relationship must agree to not engage in any public displays of affection or other behavior that might create a hostile work environment for others or that might make others uncomfortable.

One or both employees of the relationship may need to transfer to another department or location to remove any conflicts of interest in our working environment. If a transfer will not remove the conflict of interest, one employee may have to resign or be demoted to remove the conflict of interest. LEAD Public Schools will first ask the employees to choose which employee will be subject to a transfer, demotion or resignation. If the parties fail to choose, LEAD Public Schools will choose for the individuals and will make such a decision without regard to any

protected class characteristic and in compliance with LEAD Public Schools' Equal Opportunity Policy.

Employees in a consensual relationship must act professionally toward each other at all times, even after the relationship has ended, and may not participate in any company decision-making processes that could affect each other's pay, promotional opportunities, performance reviews, hours, shifts or career, while in the relationship or after the relationship ends. If the relationship ends, both employees agree to respect the other person's decision to end the relationship and will not retaliate against the other person, engage in any unprofessional or inappropriate efforts to resume the relationship, or engage in any other conduct toward the other person that could violate the Sexual Harassment Policy.

Attendance Policy

Faithful attendance of all employees, as scheduled, is an important element in the operation of LEAD Public Schools (LPS). Excessive absenteeism or tardiness, or a combination of the two, will result in progressive discipline up to and including termination. All planned absences must be approved by the Manager at least ten (10) days in advance. For unplanned absences, please contact the Manager via cell phone as soon as possible so that arrangements can be made.

Employee Responsibility

1. Report for work on time and as scheduled.
2. Ensure that the employee's manager is properly notified if the employee needs to request time off.
3. Request time off from work in ADP. If possible, the request should be submitted in ADP prior to the absence.
4. Provide medical statements when required for the use of Paid Time off.
5. Take steps to correct problems which frequently cause excessive absences or tardiness.
6. Log into ADP for accrual paid time off balance and use.

Dress Code

The following policy and guidelines support a professional work environment, and as such, require all employees to adhere to a business-professional dress code. Appropriate professional dress extends beyond the classroom and allows any school visitor – whether it's a family or potential student, job candidate, volunteer, donor, etc. – to view our employees as the

outstanding professionals that they are. Our dress code is designed to help us all provide a consistent professional appearance, as it reflects on ourselves and the greater network as a whole. For employees and volunteers, professional dress is defined as:

- **All days:** employees should wear their Employee ID at all times on a LEAD-issued lanyard, displaying either LEAD or their LEAD campus branding.
- **LEAD Business Professional: (Monday through Thursday Schedule):** “Business professional” is defined as a tucked-in button-down collared shirt or polo, and belt, (wearing a tie is *optional*) and slacks/khakis or a blouse and slacks/khakis, skirt or dress of appropriate length and fit. Professional dress shoes are *required* (see your manager for examples/non-examples). Sneakers are not allowed as part of professional attire unless you are a PE teacher. Headwraps/scarves are permitted in the workplace.
- **LEAD Business Casual: (Friday and Summer Schedule):** “Business Casual or College/LEAD Attire” is defined as a LEAD polo or t-shirt, or a college/university shirt, belt and long pants or dress skirt. Sneakers are permissible on Friday.
 - **“Dress Down Fridays”** - On the first and third Fridays of the month, jeans are permissible as a part of the LEAD Business Casual Dress Code.

***Note:** LEAD Business Casual is appropriate during the summer unless you are attending a LEAD sponsored event or a LEAD sponsored event is taking place on your campus. Examples of LEAD sponsored events include but are not limited to LEAD University Professional Development, Summer School, Data Days, etc.

Clothing that is not allowed on any day, includes, but is not limited to:

- Jeans or shorts are not permissible of any color. (Dress down Fridays are permitted on the first or third Fridays of the month)
- Attire that includes language or graphics that are vulgar, sexually explicit, or may otherwise be offensive.
- Sweatpants, athletic apparel, yoga pants, shorts or leggings as trousers. Athletic apparel is appropriate for PE teachers on days in which they are teaching a PE course or for teachers on an appropriate field trip.
- Shoes that are not conducive to a productive and professional working environment, including flip-flops, or heels three inches or higher. Professional dress shoes are required.
- Revealing clothing, low-cut shirts, any items bearing the midriff, and shorts, tank tops, strapless or off-the-shoulder shirts or dresses.

- Hats or baseball-style caps are not permitted during school operating hours within school buildings.

Employees who are not confident their attire meets the LEAD dress code should err on the side of modesty and ask their manager for guidance.

Accommodations to the dress code may be made for religious beliefs. Employees requesting accommodations for religious or other reasons should speak to their manager. The Head of Schools and Director of Human Resources will review requests for approval. Dress code infractions will be handled on an individual basis by the Head of Schools and Director of Human Resources based on failure to adhere to the dress code policy.

Summer Time Dress

- **When does summer time dress apply?** After the school year officially ends and students are not present, but prior to LEAD University.
- **What if there are no students in the school building, and we are closed for business?**
The dress code is relaxed meaning that team members can wear shorts, jeans, and sneakers tastefully if they so choose.

Fitness for Duty

Employees are required to report that they are taking medication that may affect their ability to perform their job duties; however, employees are not required to identify the medication or health condition that requires them to take medication. If an employee is restricted from performing certain job duties because he or she is taking medication, he or she must provide a statement from a physician.

Drug-Free Environment and Substance Abuse Testing

As a recipient of federal grants, LEAD maintains a drug-free workplace pursuant to the requirements of the Drug-Free Workplace Act. Lead Public Schools is committed to providing a safe work environment and to fostering the well-being and health of its employees. That commitment is jeopardized when any Lead Public Schools employee illegally uses drugs on or off the job, comes to work under their influence, possesses, distributes or sells drugs in the workplace, or abuses alcohol on the job. Therefore, Lead Public Schools has established the following policy, pursuant to T.C.A. Section 50-9-100 et.

- It is a violation of company policy for any employee to use, possess, sell, trade, offer for sale, or offer to buy illegal drugs or otherwise engage in the illegal use of drugs on or off the job.

- It is a violation of company policy for any employee to report to work under the influence of or while possessing in his or her body, blood or urine, illegal drugs in any detectable amount.
- It is a violation of company policy for any employee to report to work under the influence of or impaired by alcohol.
- It is a violation of the company policy for any employee to use prescription drugs illegally, i.e., to use prescription drugs that have not been legally obtained or in a manner or for a purpose other than as prescribed. However, nothing in this policy precludes the appropriate use of legally prescribed medications.
- Violations of this policy are subject to disciplinary action up to and including termination.

Everyone shares responsibility for maintaining a safe work environment, and co-workers should encourage anyone who has a drug problem to seek help. Lead Public Schools provides free confidential counseling to employees through our Employee Assistance Program (please see the Benefits section for additional information).

As a condition of employment, employees must abide by the terms of this policy and must notify LEAD Public Schools in writing of any conviction of a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction. Lead Public Schools reserves the right to require a pre-employment drug test, or, with probable cause, require an employee to undergo substance abuse testing. Failure to submit to a required substance abuse test also is misconduct and also shall be subject to discipline up to and including termination.

By signing the employee manual, employees consent to submit for a drug and/or alcohol test, if requested. Failure to comply with a drug and/or alcohol testing request or a positive confirmed result for the illegal use of drugs and/or alcohol may lead to discipline up to and including termination of employment and/or loss of workers' compensation benefits. Employees consent to urinalysis and/or other tests as shall be determined by LEAD Public Schools in the selection process of applicants for employment, for the purpose of determining the drug content thereof. Employees agree to hold harmless LEAD Public Schools and its agents from any liability arising in whole or part out of the collection of specimens, testing, and use of the information from said testing in connection with LEAD's testing.

Smoking/ Tobacco Use

All LEAD Public Schools campuses are tobacco free.

Background Check and Fingerprinting

LEAD Public Schools complies with state law in ensuring all employees have a cleared background check and fingerprinting prior to working at LEAD. Employees must be cleared prior to working at LEAD. The cost is the responsibility of the employee. In accordance with state law (TCA 49-5-413), employees will be rescreened every five (5) years. Additionally, employees must be cleared through the Department of Children's Services background check system. A failure on a background check may be grounds for termination in accordance with state law and local district policy.

Intentional or Unintentional Misuse, Improper Disclosure, or Dissemination of Criminal History Records Information (CHRI):

If CHRI is improperly used, disclosed, or disseminated (regardless of whether this misuse, disclosure, or dissemination was intentional), the Chief Human Resource Officer or Director of Human Resources shall be notified immediately. Depending on the nature and circumstances of the misuse, disclosure, or dissemination, the parties involved may be reprimanded or subject to disciplinary action up to and including termination. The willful, unauthorized disclosure of CHRI may also result in state or federal prosecution.

Proprietary Information

Employees who work with confidential and proprietary information of LPS, such as student information, employee records or pay, financial data, fundraising proposals, etc., must use such information only for LPS business purposes and must keep such information confidential during and after employment by LPS. LPS will use legal means, if necessary, to protect its interest in proprietary information.

Technology Loan Agreement

LPS provides all Teachers and certain Support Staff a laptop for the purpose of enhancing the employee's ability to fully carry out his/her responsibilities. Employees who take advantage of this opportunity will be responsible for operating, maintaining and exercising control and possession of their technology at ALL times during the period that the device is on loan. The staff person should return the device to LPS in as good working condition as when it was

delivered to them, ordinary wear and tear expected. Individuals shall reimburse LPS for repair or replacement of LPS property lost, stolen damaged or vandalized while under their care, due to gross negligence or willful abuse, including damage resulting from unauthorized downloads or alterations to existing data, with the understanding that those costs will not exceed the original cost of the lost or stolen machine. LPS reserves the right, at any time and for any reason, to exchange the device or to ask that a machine be returned. Employees also agree not to download any illegal software onto their computer or tablet. All LEAD issued technology must be returned prior to an employee's last day of employment at LEAD.

Information Technology & Computer Software

Employees are encouraged to use LPS technology resources to promote student learning and communication with the home and education-related entities. LPS's information systems and systems equipment are provided to employees for LPS business purposes. In no event shall an employee use LPS's information systems in a way that may be disruptive or offensive to others, or in violation of LPS's policy or any law. LPS's policy against sexual and other harassment applies fully to the use of information technology. Technology-based materials, activities and communication tools shall be appropriate for and within the range of the knowledge, understanding, age, and maturity of Students with whom they are used.

All information contained in or arising directly or indirectly from the use of LPS's information systems and systems equipment constitutes LPS business records and is the property of LPS. For example, this includes, but is not limited to:

- electronic mail messages
- voice mail messages
- contacts
- computer files
- passwords
- computer data
- information obtained from on-line services and the Internet

Examples of prohibited activities on LPS information systems include, but are not limited to:

- Making offensive or harassing statements, including disparagement of others based on race, color, national origin, ancestry, sex, sexual orientation, age, disability, religion or any other basis prohibited by applicable law;
- Sending, downloading or soliciting sexually oriented messages or images;
- Knowingly using LPS systems to download or distribute pirated software or data;

- Distribute or print copyrighted materials in violation of copyright laws, or create or process unlicensed copies of copyrighted software.
- Use LPS systems to propagate any virus, “worm,” or other destructive code.
- Use a code, access a file or retrieve any stored communication unless they have been given authorization to do so. Each employee is responsible for the security of his/her own password.

LPS reserves the right to access, monitor, intercept and/or disclose any of the foregoing information for any purpose at any time. Employees should have no expectation of personal privacy in any material stored, created, received, or sent using any of LPS’s information technology tools. Accordingly, employees should be aware that information such as electronic mail messages, voice mail messages, and computer files are not personal, private, or confidential and may be accessed, monitored, intercepted and/or disclosed by LPS in its sole discretion. All passwords must be disclosed to the network administrator.

In addition, all files and work products created during, or related to, an employee’s tenure at LPS are the property of LPS. The location of all files and work products needs to be communicated to an employee’s manager prior to their last work day. No files or work product may be duplicated or removed without the express written consent of the CEO. Work product specifically includes contact information collected or used as a part of business either in hard copy or electronic media.

LPS has purchased or licensed the use of computer software solely for its own operation; LPS does not own the copyright to this software or its related documentation and, unless authorized by the software developer, does not have the right to reproduce it for use on more than one computer.

Media Inquiries

The CEO and Director of Communications are the official media representatives of LPS, who disseminate information to the media and arrange press interviews. All inquiries from the media should be promptly referred to the Director of Communications. No LPS employee shall represent him or herself as a spokesperson for LPS without prior approval of the Director of Communications. Employees may not have “off the record” conversations with the media. Employees are not authorized to extend the use of the LPS name to endorse any private or public candidate, project, service, or cause. Employees wishing to support such endeavors must make it clear to the public that the thoughts and viewpoints expressed are their own and not those of LEAD Public Schools.

Social Media Policy

It is important that all employees consider how their actions outside of the walls of the school may impact their work. We need to be mindful about the public nature of social media and how it may impact our professional life at LEAD Public Schools. Be aware that anything you post online can be accessible to others outside of your immediate circle.

Please stop and consider the following guidelines before posting or sending information:

- Employees should not invite or accept students to be members of their immediate social group on social media sites (for example, employees should not “friend” their students on Facebook).
- While employees may post generic information online about their school, including celebrating achievements, publicizing events or sharing pictures of their school or students, to protect the privacy of all students, employees may not identify any students or their family members by name. Employees must also be careful to not post any personal or academically sensitive information about any students at LEAD (for example, noting a particular student as having an IEP or being homeless).
- Employees should also be cognizant of their online interactions with students and other adult members of the LEAD community. Employees will be responsible for any exposure/access by students and other members of the LEAD community to inappropriate or unprofessional content, including words or pictures.
- Online discourse is individual interactions, not LPS communications. Employees are personally and legally responsible for their own communications.
- When posting about education related matters, employees must identify themselves and make it clear that they are speaking for themselves alone.
- Employees may not discuss or divulge confidential LPS information, including, but not limited to student information, proprietary information that has not been made public, or other copyrighted materials.

Political Activity at LEAD

LEAD wants to provide clarity around what is allowable with respect to political campaigns, endorsements, and communication. An employee’s choice to work within a public school system does not restrict them from expressing their rights as a citizen; however, it must be evident that any political activities LEAD employees engage in are undertaken solely on behalf of the individual personally, and not as a representative of our school system. While LEAD Public Schools is a network of charter schools that are operated separately from MNPS, LEAD

follows the MNPS policies and procedures as it relates to endorsements of candidates and involvement in political campaigns. Below is some specific guidance:

- Endorsement: LEAD employees may not endorse a candidate or support a political campaign on behalf of our school system or any of our campuses.
- Social Media: Employees may retweet, like a post, or share information about politically affiliated organizations or candidates, but endorsements need to be communicated clearly as being voiced from the employee as an individual, not as a LEAD Public Schools staff person. Any social media activity in support of a candidate must be made from an employee's personal account, not school accounts.
- Volunteering: Employees may volunteer for any campaign or attend political events, but may not do so as a representative of LEAD Public Schools, its affiliate campuses, and employees may not wear school branded attire.
- Marketing or Information Sharing: Any information that employees share on behalf of any political candidate should not be done so using LEAD school email account, media sites, webpages, or on school property. Employees may put marketing information (such as flyers, signs, stickers, etc.) on their personal property, such as their yard or car, but they may not bring any political marketing material on school property and staff may not conduct any political activities on school properties.

Fundraising

LEAD Public Schools strives to provide employees with all the resources they need to be successful in the classroom. Should an employee have additional needs, we encourage them to speak with their Principal. Any fundraising activities must be approved by a school manager in collaboration with our Vice President of Development. Employees should not create fundraisers (such as online fundraising pages, local fundraising events, etc.) without first receiving approval.

Ethics Compliance Policy

LPS is committed to maintaining a positive, ethical work environment for all employees. Further, the school is also committed to facilitating open and honest communications relevant to our governance, finances, and compliance with all applicable laws and regulations. It is important that LPS be apprised about unlawful or improper behavior including, but not limited to, any of the following conduct:

- theft or fraud
- abuse or misuse of LPS's resources or assets
- financial reporting that is intentionally misleading
- improper or undocumented financial transactions
- harassment of any kind (as defined in the Personnel Policy)
- any behavior that violates the Personnel Policy or City, State or Federal laws
- any other improper occurrence regarding cash, financial procedures, or reporting

We request the assistance of every employee who has a reasonable belief or suspicion about any improper conduct. LPS values this input and each employee should feel free to raise issues of concern, in good faith, without fear of retaliation. Employees will not be disciplined, demoted, lose their jobs, or be retaliated against for asking questions or voicing concerns about conduct of this sort.

At the same time, LPS expects all employees to take this policy seriously, to use it in good faith, and to use it when necessary and in a judicious manner. Reports that are not made in good faith, or otherwise are intended to harass or annoy an employee, may result in disciplinary action, including termination.

We encourage any employee who has a concern regarding an action concerning LPS's governance, finances, ethics policy or compliance with all applicable laws and regulations to raise the concern with their Manager, Chief Human Resource Officer or CEO.

If for any reason the employee does not believe these channels of communication are adequate, the concern should be reported immediately to the chair of the Board. The Board Chair will coordinate the investigation and LPS will take appropriate action as it deems justifiable by the circumstances.

Problem Resolution

From time to time, employees may have concerns in the workplace. LEAD Public Schools believes strongly that these matters should be aired and resolved in an orderly fashion, rather than be ignored. LEAD Public Schools requests that issues be handled in the following way:

1. The concerned employee should first raise the matter with their direct manager. Employee and direct manager will determine next steps and whether or not HR should

be involved. If the matter concerns their direct manager, the concerned employee should go directly to HR.

2. If the concern persists after a reasonable attempt to resolve it, the employee should submit, in writing, a description of the problem to their direct manager and HR.
3. Once the concern has been submitted in writing, HR will conduct a comprehensive review to determine appropriate actions and next steps.
4. Once the comprehensive review is complete, HR will communicate the decision to the concerned employee and any other relevant parties.

Employee Conduct and Progressive Disciplinary Action Policy

Working at LPS requires an understanding of our commitment to teamwork on all levels and mutual respect amongst all employees. Implicit in these principles is the acknowledgement that every employee is a role model for the youth attending LEAD Public Schools and behavior contradictory to this is unacceptable and may be grounds for disciplinary action up to and including termination.

Generally, LEAD Public Schools uses a progressive disciplinary action model in which the severity increases each time an infraction continues to occur. A manager may take corrective disciplinary action regarding infractions to correct employee behavior by initiating any of the following, including but not limited to, verbal counseling, written reprimand, suspension and termination. Progressive disciplinary action is taken to correct an infraction and ensure transparency between a manager and employee. Progressive discipline is dependent upon the situation and is not always a sequential process.

Grounds for Disciplinary Action:

The following is not an exhaustive list, but constitutes grounds for disciplinary action:

1. Insubordination toward the manager.
2. Absence without notification or absence recorded as an unexcused absence.
3. Drinking intoxicating beverages, using drugs not specifically prescribed to the employee by a licensed physician or using a controlled substance while at work, whether under the influence of the beverage, drug, or controlled substance or not.
4. Being under the influence of intoxicating beverages or drugs not specifically prescribed for the employee by a licensed physician or controlled substances when at work or upon reporting to work.
5. Possession of illegal drugs or a controlled substance while at or away from work.

6. Violation of any written rules, policies or procedures of the school in which the employee is employed or LEAD Public Schools.
7. Dishonesty.
8. Conviction of a felony.
9. Inability to perform duties, when reasonable accommodation has been considered and cannot be made.
10. Neglect or failure of any employee to properly and promptly make reports or furnish information specifically required by LEAD Public Schools.
11. Excessive absenteeism and/or excessive tardiness and/or abuse of sick leave.
12. Violation of safety rules, regulations or procedures.
13. Unauthorized sleeping while at work.
14. Damage to or loss of LEAD Public School property caused by negligent acts of the employee.
15. Unlawful or unauthorized possession of a weapon, as defined by applicable laws, while at work or while on LEAD Public School property.
16. Using abusive or profane language so as to create a disturbance in the workplace.
17. Falsifying employment or any official document of LEAD Public Schools.
18. Disclosing confidential information to unauthorized persons.
19. The use or threat of violence or intimidation when directed toward another person.
20. Discrimination on the unlawful basis of race, sex, color, age, religion, national origin, handicap or lawful political or employee group affiliation.
21. Participation in a pattern of harassment toward an employee of LEAD Public Schools.
22. Conduct unbecoming an employee of LEAD Public Schools as defined as immoral, unethical, or illegal conduct.

LPS reserves the right to immediately dismiss employees for any of the aforementioned infractions, which is not an exhaustive list.

Solicitation Policy

Employees should be able to work in an environment that is free from unnecessary annoyances and interference with their work. In order to protect our employees and visitors, solicitation by employees is strictly prohibited while either the employee being solicited or the employee doing the soliciting is on “working time.” “Working time” is defined as time during which an employee is not at a meal, on break, or on the premises immediately before or after a shift. Employees are also prohibited from distributing written materials, handbills, or any other type of literature on working time and, at all times, in “working areas,” which include all office areas. “Working areas” do not include break rooms, parking lots, or common areas shared by

employees during nonworking time. Nonemployees may not trespass or solicit or distribute materials anywhere on company property at any time.

Leaving LEAD Public Schools

We hope that you will remain with us for a long time. However, if you find it necessary to resign your position, we request that you give your manager a minimum written notice of two (2) weeks. Management employee positions are requested to provide four (4) weeks notice. The reason for your termination should be included within the resignation notice. Failure to give the minimum requested notice makes you ineligible for rehire. LEAD Public Schools reserves the right to accept an employee's resignation immediately and shall not be obligated to allow the employee to continue to be employed following notice of termination. LEAD Public Schools is under no obligation to pay the associate for the notice period should the decision be made to accept the resignation immediately. Employees are expected to work all hours scheduled for the period of the notice and are not permitted to take Paid Time Off (PTO) during this period unless authorized in writing by the employee's immediate manager. If this commitment is not fulfilled, it will be considered a voluntary termination without proper notice. Benefits will be terminated on your last day of employment.

Return of Company Property

Terminated employees will be responsible for returning any property of LEAD Public Schools in their possession or that has been assigned to them including, but not limited to, identification badges, keys, credit cards, office supplies, equipment, laptop/computer, electronic devices and company documents or materials pertaining to LEAD Public Schools. Company documents are those relating to LEAD Public Schools business, whether originals or copies, whether or not you were the author or recipient, whether maintained in electronic, magnetic or disk format, which are in your possession or control, regardless of whether such documents contain confidential information or trade secrets. Documents related to your personal performance, evaluations, compensation or benefits may be retained by you. Issuance of the final paycheck may be contingent upon recovery of all LEAD Public Schools property, to the extent permitted by law. Deductions for the cost of replacement or repair for property lost or damaged while in an employee's possession may be deducted from the final paycheck, to the extent permitted by law. In the event federal, state or local law prohibits deduction from your check, you will be expected to make payment to LEAD Public Schools for such loss or repair within 30 days to avoid collection efforts.

Rehire

Former employees who terminated in good standing are eligible for rehire. A former associate who wishes to be considered for rehire must submit an employment application and follow the normal procedures required of any candidate for employment.

COBRA

LPS complies with all federal and state guidelines governing COBRA coverage. Upon termination of employment with LPS, employees will be provided with COBRA forms by their insurance provider. Forms must be filled out to either accept or refuse coverage. If an employee opts to continue coverage he or she will be responsible for the entire premium on a monthly basis. All forms and payment must be made directly to the insurance provider, not LPS. If an employee opts to continue insurance coverage, there will be no gap in coverage.

PROCEDURES FOR WORKING WITH STUDENTS

Below are the general procedures for working with students for the LEAD Public Schools network. All employees should familiarize themselves with these procedures.

Transporting Students in Cars

It is the policy of LEAD that employees not transport students in their own vehicles.

Responding to Fights

If a fight occurs, you are NOT TO INTERVENE PHYSICALLY. DO NOT allow other students to intervene. Direct non-involved students to leave the area (for example, if the fight is in the hallway, direct them into the nearest classroom). VERBALLY direct the students engaged in the fight to stop. As long as the situation is safe for you to remain in the area, monitor and continue to direct the fighting students to stop immediately. If possible, send a non-involved, trustworthy student to report the incident to school leadership or another employee for help. If a fight occurs and you are a witness, you must report the incident by email to your manager as soon as possible.

Reporting Child Abuse

Students will indicate abuse directly by disclosing it to you, or you may suspect abuse by observing injuries (bruises, cuts, etc.). If a student discloses any abuse to you or if you suspect abuse, it is your legal obligation to report that abuse to the Department of Children's Services (DCS) and your manager. Regardless of whether or not you believe the student, you must report any reported abuse. Abuse can be disclosed as physical, emotional, or sexual. To report abuse, call 1-877-237-0004 or report on-line at <https://carat.app.tn.gov/carat/>. If you would like assistance in making the report, ask school leadership for assistance. If you believe the child is in imminent danger, report the abuse immediately to a school leadership who will work with you to contact the appropriate authorities.

Disclosure of Intent to Harm Self or Others

If a student discloses self-harm or you suspect that a student is self-injuring, report concerns immediately to a school leadership who will work with you to contact the appropriate assistance for the student.

School Safety

All employees are expected to promote school safety. Employees should not prop open doors or distribute access codes or keys to any other individuals. All employees are expected to follow the safety procedures outlined in their campus safety plan.

Handling Student Data

Student data at LEAD is protected by FERPA. Electronic data must be kept secure at all times. In dealing with data, employees should observe the following practices:

1. When sending student data electronically to any party outside of LEAD, remove any identifying information that might connect students to the school
2. When emailing, use students initials instead of full name to maintain anonymity in communication
3. Keep all student test scores, grades, evaluations, and other personal information locked when not in use
4. Student cumulative files are kept filed in the main office or the SPED offices and are NOT TO LEAVE those rooms. When not in use, they are kept in the locked cabinets
5. Student information on your laptop should be password protected; putting a sleep password on your laptop will sufficiently protect the data.

Among its several purposes, the Federal Family Educational Rights and Privacy Act of 1974 (FERPA) was enacted to protect the privacy of a student's educational record by limiting disclosure of the records, to establish the right of students to inspect and review their educational records, and to provide guidelines for the correction of inaccurate or misleading data through informal and formal hearings. The Act also provides for LEAD's disclosure of certain "directory information." Students have the right to file complaints with the Department of Education's Family Educational Rights and Privacy Acts Office concerning alleged failures by an institution to comply with the Act.

COMPENSATION

Pay Day

Current paydays are every other Thursday for all employees. In the computation of hourly pay and employee benefits, the employee workweek is considered to begin at 12:00 am on Saturday and end at 11:59 pm on Friday. LEAD Public Schools pays its employees over 26 pay periods each year; all Salaried Staff who work a full school year will be paid over 26 pay periods.

Our prorated compensation system ensures fair payment based on the actual number of days worked within each pay period.

For example, if an employee joins LEAD Public Schools in the middle of a pay period, the prorated amount is calculated based on the number of days worked. Let's say the pay period runs from May 15th to May 28th, and the employee starts on May 20th, working five days.

To calculate the prorated amount, we divide the employee's monthly salary by the number of working days in a full pay period. Assuming a monthly salary of \$2,000 and a standard pay period of ten working days, the daily rate would be \$200 ($\$2,000 / 10$ days).

In case of termination, a prorated calculation will also be applied to ensure fair compensation for the days worked during the pay period. Deductions and withholdings will be adjusted accordingly.

Our commitment is to maintain transparency and fairness in our compensation practices, accurately reflecting employees' earnings based on the time they have worked

Summer pay is a benefit earned by school calendar employees who work until or are active on the final day of the school year. Failure to fulfill this requirement will result in the forfeiture of summer pay. This is not related for the extended school year (i.e. Summer School).

Eligible employees include teachers, administrators, and staff members hired based on the academic year schedule. To be considered "active," employees must engage in their assigned duties until the official conclusion of the school year, unless prior approval for absence is obtained. Verification of active status will be conducted, and appeals regarding summer pay forfeiture can be submitted within a specified timeframe.

This policy ensures transparency and accountability in the allocation of summer pay. It emphasizes the importance of working until or being active on the last day of school for eligibility. School calendar employees are responsible for complying with this requirement, and exceptions may be granted based on prior approval and exceptional circumstances. The policy will be periodically reviewed and amended as necessary, and employees will be promptly informed of any changes.

Payroll Deductions

All required deductions, such as federal, state and local taxes and social security, and all authorized voluntary deductions, such as health insurance contributions, will be withheld automatically from your paychecks. Court-ordered wage assignments must be accepted and honored. If you have questions concerning deductions made from your paycheck or how they were calculated, contact Human Resources at HRADP@leadpublicschools.org.

Direct Deposit

All employees are required to enroll in direct deposit during Onboarding in ADP. If employees want to make changes to their direct deposit information, it is recommended to do so at the beginning of a pay period to allow the new account to be active and able to accept the deposit. Making changes to the direct deposit account on or near payday could result in the funds not being deposited into the new account.

Time Keeping

All non-exempt hourly employees are required to maintain time records that accurately reflect their actual hours worked and hourly rate. Recording incorrect or false information regarding actual hours worked is considered misconduct and may result in disciplinary action as provided in this handbook. All timesheets must be submitted and approved by the manager in ADP no later than Friday at 5 pm. Failure to meet this deadline may result in a delay of payroll processing of up to two weeks.

Overtime

Non-exempt hourly employees are paid one and one-half times their regular hourly rate for all hours worked per week beyond 40. Overtime must be approved by a manager prior to working 40 hours. Exempt employees, including Teachers and Salaried Support employees, are not eligible for paid overtime.

Salary Increases

Employee salaries are generally reviewed on an annual basis. In considering whether to increase salaries, LPS takes into account such factors as annual performance and budgetary parameters.

W-2

W-2s will be issued to all employees by the IRS deadline (typically the last day of January following the tax year). It is the employee's responsibility to update his/her address on the ADP website to ensure receipt of the W-2.

Expense Reimbursement

An expense reimbursement refers to the process of compensating individuals for their out-of-pocket expenses incurred while performing their job duties. Generally, LPS does not allow individual employees to claim expense reimbursements. Instead, LPS handles payments to vendors through methods such as purchase orders, purchasing cards, and standard invoicing. Reimbursements are only granted in exceptional circumstances, specifically for emergency expenses directly related to an employee's assigned responsibilities.

Eligible emergency expenses may include, but are not limited to:

- Urgent travel expenses required for work purposes
- Emergency repairs or replacements of essential equipment needed for job performance
- Unforeseen medical expenses incurred during work-related activities
- Other emergency expenses approved by management on a case-by-case basis

Strictly Prohibited expenses may include, but are not limited to:

- Personal items
- Alcohol and tobacco products
- Non-work-related travel expenses
- Political contributions
- Gambling activities
- Gift cards

Requirements for Emergency Expense Reimbursements

- Employees must submit their reimbursement requests within 10 business days from the date of purchase or occurrence of the emergency. Failure to submit within this timeframe will result in non-payment from LEAD Public Schools.
- A separate reimbursement form must be filled out for each receipt requiring reimbursement.
- To qualify for reimbursement, employees must attach detailed receipts to the reimbursement form. These receipts should provide the following information:
 - Date of the transaction
 - Vendor name and address
 - Description of the goods or services purchased
 - Amount paid
- Expense reimbursements are paid out on a set schedule determined by the company's payroll department. Reimbursements may not necessarily be processed on the next payroll cycle. Employees should consult their managers for the specific payout schedule.

Mileage Reimbursement

A mileage reimbursement is a form of compensation provided to employees who use their personal vehicles for business-related travel. It is intended to cover the costs associated with operating and maintaining the vehicle, such as fuel, insurance, and general wear and tear. At LEAD Public Schools, we reimburse mileage expenses at the Federal rate, which is determined by the Internal Revenue Service (IRS).

Requirements for Mileage Reimbursements

- Employees must submit their mileage reimbursement requests **MUST** be submitted by the 10th of the following month after the expense has been incurred. Failure to submit reimbursements within that timeframe will result in non-payment from LEAD Public Schools.
- A mileage log must be submitted with the mileage reimbursement log in order to be processed and to meet audit requirements.
- Mileage reimbursements are paid out on a set schedule from payroll and will not necessarily be processed on the next payroll. See your manager for the payout schedule.
- Mileage reimbursement does not include mileage traveling to/from your personal residence to campus locations.

BENEFITS

Overview

LEAD Public Schools strives to offer a competitive employment package, including a generous benefits package. Benefits are determined by an employee's classification (see the "Understanding this Handbook" to determine which classification applies). Please refer to the section of the Employee Manual that refers to your classification. See the next page for a table that outlines the benefits available to all staff classifications. LPS reserves the right to change policies, carriers, and coverage levels from time to time. The details of each of the insurance benefits, including questions of coverage, eligibility and benefit levels, are set forth in the insurance policies and in explanatory booklets provided electronically to eligible employees.

Employee Class		All Full Time Staff
Core Benefits	Medical Insurance	UMR - United Healthcare
	Dental Insurance	Guardian
	Vision Insurance	Guardian (VSP)
Additional Benefits	Basic Life Insurance	Guardian
	Voluntary Life & AD&D	Guardian
	Short Term Disability	Guardian
	Long Term Disability	Guardian
	Flexible Spending Account	Discover Benefits/WEX
	Dependent Care Account	Discover Benefits/WEX
Employee Class		All Staff
Additional Benefits	Employee Assistance Plan	Guardian

Additional Benefits	Spring Health	Guardian
Additional Benefits	Accident Insurance, Voluntary Critical Illness, Voluntary Hospital Indemnity	Guardian
Retirement	TCRS (Hybrid or Legacy) Pension & 401(k) Plan	TCRS, Empower, American Funds
	LEAD Support 403(b) Plan	

Full time employees are employees working a minimum of 30 hours per week and are expected to work the entire school year. Full time employees are eligible for medical, dental and vision insurance at LEAD. Coverage is effective the first day of the month after your hire date of employment (for instance, if your start date is July 5th, your coverage would begin August 1st).

Employees have 30 days from their date of hire to elect coverage. All eligible employees must do so online through the ADP website. Late enrollment may cause certain coverage restrictions or denial of coverage until the next open enrollment period. Open enrollment for the plans occurs during the spring for a July 1st effective date.

LEAD Public Schools contributes towards benefits premiums; current rates will be provided annually to all eligible employees. The employee paid portion of benefits premiums are deducted on a pre-tax basis from an employee's paycheck.

Open Enrollment is the time of the year in which employees are able to make benefits changes. Elections made during the new hire period or open enrollment will be final and cannot be changed until the next annual enrollment period unless an employee experiences a "qualifying life event" which includes the following:

- Birth or adoption of a child
- Marriage
- Divorce or legal separation

- Loss or gain of coverage through your spouse (e.g. your spouse switches from part-time to full-time and gains access to benefits)
- Loss of eligibility of a covered dependent
- Death of your covered spouse or child

Employees have 30 days from the “Qualifying Status Event” to notify Human Resources to make changes to current coverage. If employees fail to notify HR within 30 days of the qualifying life event, the next opportunity for a change to be made will be the following Open Enrollment period.

BENEFITS WHILE ON UNPAID STATUS:

Employee health benefits will be continued in the same manner as received prior to the unpaid status. While benefits continue, employees will be responsible for repayment for the employee portion of the health insurance premium and in an amount equivalent to the expected period of absence. If the employee fails to return from unpaid status, the benefits may be terminated and the employee will be advised of COBRA continuation rights.

RETIREMENT

Certified Staff (Teachers)

All certificated employees in the role of teacher are automatically enrolled in the Tennessee Consolidated Retirement System (TCRS). Plan details vary depending on the date that an employee first made a contribution to TCRS, irrespective of employer at the time of the first contribution. Employees who made contributions prior to July 1, 2014 are classified as “Legacy Employees”; Employees who made their first contributions on or after July 1, 2014 are considered “Hybrid Employees”.

Legacy Employees

Legacy Employees contribute 5% and LPS contributes 6.81 of each paycheck to the pension fund (note that the employer portion is set by TN law and may periodically change). TCRS is a “defined benefit” retirement plan, which means that the amount of any future benefit will be determined by a benefit formula rather than by an account balance. For additional information on TCRS, please see <http://treasury.tn.gov/tcrs/index>.

In addition, employees may optionally contribute to the Empower 401(k) plan; however, LEAD Public Schools does not provide any matching funds for this plan. Please see the table below for contribution rates.

Hybrid Employees

Hybrid Employees contribute 5% and LPS contributes 4% of each paycheck to the TCRS pension fund. TCRS is a “defined benefit” retirement plan, which means that the amount of any future benefit will be determined by a benefit formula rather than by an account balance. For additional information on TCRS, please see <http://treasury.tn.gov/tcrs/index>.

In addition, Hybrid are automatically enrolled in the 401(k) Defined Contribution Plan. Employees contribute 2% of each paycheck and LPS contributes 5% of each paycheck to the 401(k). Employees will automatically be enrolled in this plan unless they opt-out of the plan within 30 days of receiving enrollment letters. Please see the table below for contribution rates.

	Defined Benefit		Defined Contribution		Total Contributions	
	Pension		401(k)			
	Employee	LEAD	Employee	LEAD	Employee	LEAD
Legacy	5%	6.81%	Optional	no match	5% or more	6.81%
Hybrid	5%	4%	2% (unless opt out)	5%	7% (opt out: 5%)	9%

* Contributions listed above are subject to change based on guidance received from the state of TN.

Support Staff (Non-teachers & including hourly employees)

All Non-TCRS salaried employees are eligible to participate in the LPS 403(b) plan. The 403(b) plan is a defined contribution plan in which employees have the ability to choose between different investments for their payroll deductions.

Employer Matching

Participants can make individual contributions to the plan through automatic payroll deductions of their eligible pay on a pretax basis. To assist employees in saving for their retirement, LPS provides a generous matching program in which LPS will contribute double the employee contribution for the first 3% an employee contributes. See the schedule below for matching details.

Employee Contribution	LEAD Matching Contribution	Total Contribution
1%	2%	3%
2%	4%	6%
3%	6%	9%
4%	6%	10%

5%	6%	11%
6% and higher	6%	Between 12% and 100%

Vesting

100% of the Employee contributions are deposited into the Employee's account with each payroll period. However, the matching funds contributed to the plan are transferred to the Employee over time. At the one year anniversary of the employee's hire date, the employee will receive 33% of the designated matching funds; at the two year anniversary, the employee will receive an additional 33% and the final 34% will be transferred at the employee's three year anniversary. If an employee ends his or her employment with LPS, for any reason, the employee forfeits matching funds that have not yet been transferred.

For example, consider an employee who joins LEAD on 11/1/2018 and chooses to contribute 3% of his or her wages. This employee may begin contributing to his or her retirement on their first pay period. LEAD will match those funds at 6% of the employee's wages; however, LEAD will wait until the employee's second anniversary of 11/1/2020 to transfer funds into the employee's account. At this point, LEAD will put in 33% of the employee's matching funds. If this employee leaves in his or her second year, the employee will forfeit the remainder of the matching funds earned in the first year.

ADDITIONAL BENEFITS

The following benefits are available to ALL employees:

Employee Assistance Program

All employees (both exempt and non-exempt) are eligible for the Employee Assistance Program through Work life Matters. This program provides free, confidential assistance for the emotional health of employees, their spouses and children. Our EAP provides counseling, coaching, crisis intervention and community resource referrals.

To use this benefit 24/7, please call 1-800-386-7055. Or go online to:

www.ibhworklife.com

Username: Matters

Password: wlm70101

Workers' Compensation

If you experience a workplace injury while working at LEAD Public Schools, contact the Director of School Operations immediately and complete the LEAD's Workplace Incident Report. Once submitted, HR will email you detailed instructions on next steps. The Director of School Operations will advise the employee to follow Human Resources detailed instructions provided to the employee to ensure compliance with the workplace injury process. If this is a medical emergency dial 911.

If this is a non-medical issue, the employee should see the nurse if medical attention is needed. The school nurse is not a substitute for filling out the form nor is the school nurse evaluating whether or not a worker's compensation claim is needed. The injured staff member should notify their direct manager of the incident.

Failure to notify LEAD Public Schools of an on-the job injury in a timely manner may result in disciplinary action up to and including termination of employment. LEAD Public Schools may require staff to complete a drug/alcohol screening following a workplace incident.

Paid Time Off (PTO)

Paid Time Off (PTO) is provided to offer employees with flexible time paid time off from work that can be used for such needs as vacation, personal, or family illness, doctor appointments or other activities. PTO is provided to all employees and is prorated based on budgeted hours worked. PTO will accrue per pay period and starts each year with the first payroll in July. If you are hired after July, PTO accrual will be prorated based on the table below. Paid leave time may be taken in half day increments (4 hours equals a "half day" and 8 hours equals a "full day").

Employees accrue their paid time off throughout the year; therefore, if an employee begins the school year late or leaves LEAD before the end of the school year, they will only accrue a portion of their eligible paid time off. Employees may not use unused paid time off during the last two weeks of their employment or to extend their termination date.

Accrual of PTO

Full time, 40 hour a week, school year employees accrue PTO based on an annual accrual of 80 hours or 3.33 hours each pay period. For those working less than 40 hours, the accrual rate will be prorated based on scheduled work hours.

Full Time, 40 hours a week, Calendar Year Employees accrue PTO based on an annual accrual of 96 hours or 3.69 hours per pay period. For those working less than 40 hours, the accrual rate will be prorated based on scheduled work hours.

An employee can request no more than 40 hours if their PTO balance is less than 40 hours. The negative balance will replenish each pay period. If an employee reaches a balance of -40 hours and takes a day before that balance replenishes, that day must be taken as unpaid time off. If an employee leaves employment with a deficient PTO balance, this amount will be withheld from final pay.

If you are hired after the month of July, PTO accrual will be prorated based on the table below for school year and calendar year employees with the negative balance limits that employees can use during the school year.

Hired Month	School Year	Calendar Year	Negative Balance
7-1	80	96	-40
8-1	73.26	81.18	-40
9-1	66.6	73.8	-40
10-1	59.94	66.42	-40
11-1	53.28	59.04	-40
12-1	46.62	51.66	-40
1-1	33.3	44.28	-20
2-1	26.64	36.9	-20
3-1	19.98	29.52	-20
4-1	13.32	22.14	NA
5-1	6.66	14.76	NA
6-1	0	7.38	NA

All Paid Time Off must be requested through the ADP system. Employees should reach out directly to their manager with any questions regarding Paid Time Off eligibility or accrual.

Sick bank balances can only be accessed to meet the elimination period for a short term disability claim, maternity leave or FMLA. These balances would be exhausted before STD benefits are paid. Sick bank balances only pertain to employees hired prior to July 1, 2022.

Employees who are sick must notify their manager via phone prior to 6:00 am on the day(s) they will not be able to work due to illness, injury; however, as much advance notice as possible is encouraged. PTO used for scheduled medical or dental appointments must be approved 10 days in advance.

Where appropriate, the manager or Human Resources may request that the employee provide a doctor's note verifying the illness, injury, or appointment. Employees will be required to provide a doctor's note if:

- An employee takes a PTO day before or after a holiday, professional development day or during testing (MAP, TCAP, EOC, AP exams).
- An employee takes 3 consecutive PTO days due to a personal illness.

Failure to provide a doctor's note will result in the day being unpaid and may result in disciplinary action.

Approval of PTO

PTO should be approved by the employee's manager at least 10 days in advance, unless PTO is being used for illness.

PTO Sell-Back

Unused PTO remaining at the end of the year can be sold back with the first payroll of the following school year. Employees can sell back a maximum of 5 unused PTO days at a rate of \$100 per unused day. Unused PTO does not rollover. In order to be paid out, individuals must be employed with LEAD Public Schools at the time of the PTO payout.

Holiday and Break Policy

All LEAD employees are eligible to observe paid holidays and breaks. Schools and offices will be closed during holidays and breaks. Occasionally, employees may need to work during breaks. Each employee should work directly with his or her manager to determine what tasks, if any, may be necessary to complete during school holidays or breaks.

Our goal is to have staff take time away from work during paid holidays and breaks. On rare occasions employees may need to work during break. In these instances where there is critical work with no other option, PTO will be provided in exchange for hours worked. However, this needs to be approved by Human Resources in advance.

Critical Days, Unapproved Absences, and/or Unapproved PTO.

Critical Days are defined as periods of school/network operations where it is mandatory that employees report to work. Requests for PTO during critical days may be denied. Critical days are defined as the following:

- Professional Development Days
- TNReady testing days
- The day before and after a break or holiday. Holidays and breaks for the 23-24 school are:
 - New Year's Day
 - Martin Luther King
 - Good Friday
 - Spring Break
 - Memorial Day
 - Juneteenth Day
 - Independence Day
 - Labor Day
 - Fall Break
 - Veterans Day
 - Wednesday before Thanksgiving
 - Thanksgiving Day
 - Friday after Thanksgiving
 - Winter Break
 - Christmas Eve
 - Christmas Day

In addition to Critical Days, PTO requests may be denied when an employee's absence causes undue hardship to students, the school or the network, if an employee is requesting too much time off at once, if too many employees are out on a particular day and/or if proper notice is not given. If PTO has not been approved and the employee is still absent, the day will be unpaid and may be subject to disciplinary action.

If an employee is sick on a critical day, then the employee will be required to provide a doctor's statement. Failure to provide a doctor's statement may result in the employee not being paid for the time off.

The following will be declared official school holidays and/or breaks and all full-time and part-time salaried employees working at least 30 hours per week will be excused without charge to leave:

- New Year's Day
- Martin Luther King
- Good Friday
- **Spring Break**
- Memorial Day
- Juneteenth Day
- Independence Day
- Labor Day
- **Fall Break**
- Veterans Day
- Wednesday before Thanksgiving
- Thanksgiving Day
- Friday after Thanksgiving
- **Winter Break**
- Christmas Eve
- Christmas Day

Holidays that fall on Sunday will be observed on the following Monday and holidays that fall on Saturday will be observed on the Friday before by those employees working Monday through Friday.

Bring your Child to Work Policy

This policy is established to avoid disruptions in job duties of the employee and co-workers, reduce personal and property liability, and help promote the learning environment of LEAD Public Schools Employees with dependent children are expected to make regular arrangements for proper care of their children while at work.

PROCEDURES:

- A. Employees and managers must consider issues of safety, confidentiality, disruption of operations, disruption of services, disruption to other employees, appropriateness, and legal liability, as well as sudden emergency, posed by the presence of children in the workplace. Therefore, employees are prohibited from bringing minor children on campus during working hours.
- B. As used in this policy, the terms "minor" and "children" are defined as any individual who has not reached the age of 18. For purposes of this policy, difficulty or inability in arranging childcare does not constitute an emergency.

- C. It is the responsibility of managers to ensure that the work of the campus is accomplished in an environment that promotes employee health and safety and minimizes work-related disruptions.
- D. It is inappropriate to allow workplace visits by children, whether supervised or unsupervised.
- E. Managers, with Head of Schools approval, may grant a one-time exception for a temporary, unforeseen emergency, but no parent or relative can have a child in the workplace without the manager's permission or use the workplace as an alternative to childcare or for any other purpose. When authorized, the accompanying adult must supervise the children at all times.
- F. Managers may direct an employee to remove a child from the workplace. In this event, the employee will be charged with leave for any time that he or she is absent from his/her assigned station. Managers may make exceptions for holiday parties and "Take Your Child to Work Day" with prior written approval from the Head of Schools and Chief Human Resources Officer.
- G. No minor may ever be allowed into an area that is potentially hazardous (i.e., where hazardous equipment, etc., are located); such prohibited areas include areas where chemicals are stored.
- H. Children exhibiting symptoms of potentially contagious illnesses should not be brought into the workplace. Provisions for sick children should be made within the context of various forms of leave available to staff: accrued PTO, unpaid time off, or approved FMLA. No child can be left unaccompanied by an adult in the workplace, and any employee who brings a child to the workplace and leaves him or her unattended in an office, room, hall, lounge, restroom, lunch area or elsewhere will be subject to discipline, up to and including termination.
- I. LEAD Public Schools computers are company property and vital equipment, intended for use only by employees in the course and scope of assigned duties. Computers are not to be used as a toy or entertainment for visiting children.
- J. Any exceptions to this policy must have prior written approval from the Head of Schools and Chief Human Resources Officer.
- K. LEAD Public Schools does not accept any liability for injuries to children who are on campus in violation of this policy.

Bereavement Policy

In the event of a death in an employee's immediate family, a full-time employee shall be granted a reasonable paid absence of up to five (5) paid working days. For the purposes of bereavement leave, immediate family is defined to include the death of a spouse, domestic partner, parents, parents-in-law, children, step children, grandparents, grandchildren, legal guardian or dependents, siblings.

A full-time employee may also be granted one (1) paid work day for an extended family member. For the purposes of bereavement leave, extended family is defined to include the death of aunts, uncles, nieces, nephews, sister-in-law, brother-in-law of the employee.

For other losses of family members not listed above, the absence from work may be chargeable to an employee's paid time off balance.

Part-time and hourly employees are not entitled to bereavement leave.

Bereavement time may not be carried over into the next fiscal year, nor are employees compensated for unused time upon termination.

Jury Duty

If an employee receives a summons for jury duty, the employee should present the summons to his or her manager immediately. In accordance with TN State Law, the employee may be entitled to continued compensation during the time the employee serves as a juror.

Voting Time

All LEAD employees entitled to vote in national, state, or local elections shall, when necessary, be allowed sufficient time off with pay to exercise this right as determined by LEAD Public Schools. Employees are encouraged to vote before or after work hours, when possible.

Family Medical Leave Act Policy

Purpose

The purpose of this policy is to allow employees to balance their work and personal life by taking reasonable unpaid leave for certain family and medical reasons.

Policy Statement and Scope

The Family Medical Leave Act (FMLA) allows employees to balance their work and personal life by taking reasonable unpaid leave for certain family and medical reasons. The FMLA seeks to accomplish these purposes in a manner that accommodates the legitimate interests of employers. It also seeks to minimize the potential for employment discrimination, while promoting equal employment opportunities for men and women. LEAD Public Schools intends at all times to comply with federal and state laws regarding family and medical leave.

Full-time employees who have been employed for at least a total of one (1) year and worked at least 1,250 hours during the immediately preceding 12-month period are eligible for FMLA leave, which is unpaid leave. Notwithstanding the above, employment prior to the last seven (7)

years is counted if the break is due to the employee's fulfillment of his/her National Guard or Reserve military obligation. Employees will be returned to the same or equivalent position upon their return from leave with the same pay and benefits if they return within the 12- or 26-week period, whichever is applicable (as explained below). For employees ineligible for FMLA leave, LEAD Public Schools (the Director of Human Resources and manager) will review business considerations and the individual circumstances involved when determining whether leave will be granted.

Definitions

- **Employees:** All full-time employees of the LEAD Public Schools.
- **Child:** A biological, adopted or foster child, a stepchild, a child under legal guardianship, or the child of a person who is either under 18 years old or a dependent adult.
- **Intermittent or reduced leave:** Leave due to a serious health condition may be taken intermittently (in separate blocks of time due to a single health condition) or on a reduced leave schedule (reducing the usual number of hours worked per workweek or workday) if medically necessary. If FMLA leave is taken, PTO and FMLA leave will be taken concurrently unless and until the maximum PTO time has been exhausted. If the leave is unpaid, LEAD Public Schools will reduce salary based on the amount of time actually worked. In addition, while on an intermittent or reduced leave schedule, LEAD Public Schools may temporarily transfer the employee to an alternate position which better accommodates the recurring leave and which has equivalent pay and benefits. Requests for intermittent FMLA leave require special approval from the Human Resources Department and manager to meet our business needs.
- **Parent:** A biological, foster, adoptive parent, step-parent or legal guardian, but does not include an in-law.
- **Serious health condition:** LEAD Public Schools will grant leave for any condition defined as a serious health condition under the FMLA and/or any applicable state law. In general, a serious health condition requires continued medical treatment which causes incapacitation for a period of three (3) days or longer. Evidence of a medical disability must be provided by a qualified physician or other health care provider as defined under the FMLA.
- **Spouse:** An employee's current husband or wife as determined by the laws of the state in which the employee resides.
- **Twelve (12) month period:** The twelve (12) months preceding the date the leave is requested to begin.

Procedure

Eligible employees are entitled to a total of twelve (12) weeks of unpaid leave during any rolling twelve (12) month period for any one or more of the following reasons:

1. the birth of a son or daughter or placement of a son or daughter with the employee for adoption or foster care, and to bond with the newborn or newly-placed child;
2. to care for a spouse, son, daughter, or parent who has a serious health condition, including incapacity due to pregnancy and for prenatal medical care;
3. for a serious health condition that makes the employee unable to perform the essential functions of his or her job, including incapacity due to pregnancy and for prenatal medical care
4. for any qualifying exigency arising out of the fact that a spouse, son, daughter, or parent is a military member on covered active duty or call to covered active duty status.

An exception applies in the case of married employees both employed by LEAD Public Schools in specific instances defined by federal law. Leave for the birth or placement of a child for adoption or foster care must be taken within 12 months of the birth or placement.

Eligible employees who are the parent, daughter, son, spouse, or next of kin of a covered military service member are entitled to a total of twenty-six (26) workweeks of leave during a 12-month period to care for the service member if the service member has a serious injury or illness incurred in the line of duty that makes the service member medically unfit to perform his/her military duties, and is undergoing medical treatment, recuperation, or therapy, or is otherwise on outpatient status, or is otherwise on the temporary disability retired list. The leave described in this paragraph, referred to as Military Caregiver Leave, is only available for a single 12-month period and is measured from the first day the employee takes leave until 12 months after that date. During a single 12-month period, an eligible employee is only entitled to a combined total of twenty-six (26) workweeks of leave for Military Caregiver Leave and any other FMLA-approved leave.

Eligible spouses who work for the same employer are limited to a combined total of 12 work weeks of leave in a 12-month period for the following FMLA-qualifying reasons:

- the birth of a son or daughter and bonding with the newborn child,
- the placement of a son or daughter with the employee for adoption or foster care and bonding with the newly-placed child, and
- the care of a parent with a serious health condition.

Requesting Family Medical Leave:

- LEAD Public Schools' policy requires you to provide at least 30 days advance notice of your need by completing LEAD's FMLA Request Form for FMLA leave, including intermittent leave, unless 30 days' notice is not possible or the need for intermittent leave is unforeseeable or due to a qualifying exigency, in which case you must notify LEAD Public Schools as soon as possible. Requests for intermittent FMLA leave require special approval from the Human Resources Department and manager to meet our business needs.
- Additionally, the employee is required under the U.S. Department of Labor to file completed Certification of Health Care Provider for Employee's Serious Health Condition (FMLA) or Certification of Health Care Provider for Family Member's Serious Health Condition (FMLA) paperwork.
- Lastly, upon receiving special approval from the Human Resources Department and principal/manager, you are also required to report your intermittent leave hours in ADP for accurate exception time reporting. For accurate exception time reporting, employees must enter leave in ADP no later than 3 days after using intermittent leave. Failure to follow the LEAD's leave procedures, including receiving special approval for intermittent leave and/or exception time reporting procedures could result in denial of your intermittent FMLA time. Family leave is an unpaid leave. However, FMLA leave will be taken concurrently with PTO or other benefits, resulting in partially or fully-paid leave.
- In accordance with the Department of Labor, the Human Resources Department will issue the Notice of Eligibility and Rights and Responsibilities (FMLA) along with the Designation Notice (FMLA) within five (5) business days upon receipt of the Request Form and U.S. Department of Labor to submit Certification of Health Care Provider for Employee's Serious Health Condition (FMLA) or Certification of Health Care Provider for Family Member's Serious Health Condition (FMLA) paperwork.

Returning from Leave of Absence:

Employees who return to work from FMLA for their own serious health condition must return to work with a fitness for duty (doctor's statement) by their physician. If the employee does not return to work with a fitness for duty (doctor's statement), then the employee will not be allowed to return to work until the employee can produce a statement, which clears him/her for work for their safety.

NOTICE REGARDING YOUR RIGHTS UNDER FMLA

You are entitled to certain notices from LEAD Public Schools regarding your rights under the

FMLA. When you request FMLA leave, or when LEAD Public Schools acquire knowledge that benefits your leave may be for an FMLA qualifying reason, LEAD Public Schools will notify you whether or not your leave qualifies as FMLA leave within five business days absent extenuating circumstances. You will be provided a notice which will state whether or not you are eligible for FMLA leave and, if not, at least one reason why you are not eligible for FMLA leave. This notice will also detail what your rights and responsibilities are to LEAD Public Schools in order to qualify and take FMLA leave. Failure to comply with these responsibilities may adversely impact your eligibility for FMLA leave.

Once LEAD has received information sufficient to determine whether your requested leave qualifies under the FMLA (i.e., after receiving a medical certification from your healthcare provider) LEAD will notify you within five business days (absent extenuating circumstances) whether your leave will be designated and will be counted as FMLA leave. This notice will also inform you whether you will be required to present a fitness for duty certification in order to be restored to employment at the end of your leave. If known, this notice will also notify you of the number of hours, days or weeks that will be counted against your FMLA leave entitlement as a result of your leave. If it is not possible to know the amount of leave that will be required, you may request LEAD to provide you this information once in any 30-day period in which you have taken FMLA leave.

For the duration of your FMLA leave, LEAD Public Schools will maintain your health coverage under any applicable group health plan on the same basis as coverage would have been provided if you were not on leave. As a result, you are responsible for your portion of your insurance premium while you are on leave. Your use of FMLA leave will not result in the loss of any employment benefit that accrued prior to the start of your leave.

Nondiscrimination

We are required to advise you that the FMLA makes it unlawful for any employer to interfere with, restrain, or deny the exercise of any right provided under the FMLA, or to discharge or discriminate against any person for opposing any practice made unlawful by the FMLA or for involvement in any proceeding under or relating to FMLA.

The U.S. Department of Labor is authorized to investigate and resolve complaints of any violation of the FMLA. In addition, an eligible employee may bring a civil action against an employer for violations. The FMLA does not affect any Federal or State law prohibiting discrimination, or supersede any State or local law or collective bargaining agreement which provides greater family medical leave rights.

RETURN FROM UNPAID STATUS:

Procedure for returning from unpaid status:

An employee who has been granted an unpaid status shall give their manager reasonable notification of the intent to return to work at least two weeks prior to the return date with a fitness for duty (doctor's statement) from their physician. If the employee does not return to work with a fitness for duty (doctor's statement), then the employee will not be allowed to return to work until the employee can produce a statement, which clears him/her for work for their safety. Upon receiving notification of the employee's availability, the manager or Human Resources will arrange to have the employee reinstated to the employee's previous position, if available. If the previous position is no longer available, the employee may be considered for other open positions which the employee is qualified for as they become available.

If no position exists, any obligation to reinstate the employee is discontinued and the employee's unpaid status is changed to a voluntary termination. Future reemployment would be as a rehire with only legally required reinstatement of applicable benefits.

Parental Leave Policy**Purpose of Policy**

LEAD Public Schools (LPS) recognizes the incredible life milestone expanding your family through the birth, adoption or foster placement of a child. Therefore, the purpose of this policy is to help minimize the financial burden employees face when taking a leave of absence to care for and bond with the child. PTO

Policy Scope

This policy applies to all full-time benefit eligible employees that have been employed with LPS for the last (12) consecutive months or longer. Nothing in this policy provides any contractual rights regarding employee benefits, nor does anything in this policy alter or modify the employment-at-will relationship between LPS and its employees.

Policy Statement

In order to assist and support new parents in balancing work and family, LPS provides Eligible Employees with a period of Parental Leave for activities related to the birth, bonding, care, and well-being of their newborn or newly adopted or fostered child(ren).

A. Parental Leave – Maternity

Eligible employees will receive a total of (16) weeks of paid leave ((12) weeks for recuperation for activities related to childbirth and an additional (4) weeks for bonding commencing with the date of birth of the child. LPS will supplement an employee's regular base pay after the following conditions are met.

- All eligible accrued time off balances are paid.
- All LPS observed holidays and breaks that occur during the leave are paid.

B. Parental Leave – Birth, Adoption and Foster Placement Eligible Employees will receive a total of (4) weeks for bonding and care following the birth, adoption or placement of a child(ren). LPS will supplement an employee's regular base pay after the following conditions are met.

- All eligible accrued time off balances are paid.
- All LPS observed holidays and breaks that occur during the leave are paid.

C. Timing of Leave and Amount of Leave

Eligible Employees must utilize this benefit consecutively commencing with the birth, adoption, foster placement or pregnancy related medical reasons that require leave prior to birth based on the entitlement outlined above. Intermittent leave requests will not be eligible for this paid benefit. In the maternity event that both parents/partners are employees of LPS, leave entitlement will be based on primary versus secondary designation.

Eligible Employees may utilize one term of Parental Leave per birth or adoption event within a (12) month period. For purposes of this policy, an event is defined as a delivery, adoption or foster placement of a child(ren).

Example:

- If an Eligible Employee has a delivery of multiple newborns or adopts multiple children at the same time, the employee would be eligible for one term of Parental Leave for that event.

D. Coordination with Other Statutes

Parental Leave taken under this policy shall run concurrently with leave under the Family Medical Leave Act (FMLA) or any other state or local law that may provide greater family and medical leave rights than those provided by federal law.

Example:

- When Parental Leave taken under this policy falls under the definition of circumstances qualifying for leave under the FMLA, the Parental Leave will be

counted against the employee's 12-week FMLA leave entitlement. Employees should refer to LPS Policy – Family and Medical Leave (FMLA).

In all circumstances in which federal, state, or local law provides for greater family and medical leave rights than this policy, LPS will comply with those laws.

E. Approval Process

In order to utilize Parental Leave, all Eligible employees must notify their direct manager as soon as the employee becomes aware of such a leave but no less than 30 days. The employee must log into the ADP system under Human Resources and submit a request for Family Medical Leave and notify Human Resources in writing at hradp@leadpublicschools.org. An employee's failure to comply with leave procedures may delay or result in the denial of Parental Leave.

Documentation of child placement must be presented to the Human Resources Department at hradp@leadpublicschools.org at the time of requesting Parenting Leave for approval in adoption and foster placement events.

Definitions

- **Eligible Employee:** A benefit-eligible employee who is a natural parent, same-sex partner, or adoptive parent following the birth, adoption or foster placement of a child that is under the age of 18. An employee who adopts a spouse or partner's child(ren) is not considered an Eligible Employee for purposes of this policy.
- **Parental Leave:** A period of paid leave for the purpose of providing Eligible Employees additional financial consideration during the time to bond with a newborn or with a newly adopted or fostered child under the age of 18.
- **Holidays:** The observed holidays as outlined on the school year calendar. Typically, Fourth of July, Labor Day, Veteran's Day, Thanksgiving Day, Christmas Day, New Year's Day, Martin Luther King Day, Good Friday, Memorial Day and Juneteenth Day.
- **Breaks:** The observed weeks for Fall Break, Winter Breaks, Spring Break, and Summer Break. The observed breaks that apply will be based on your status as a school year or calendar year.

Contact for Questions

Any questions regarding this policy or procedure may be directed to the Human Resources Department at hradp@leadpublicschools.org.

Military Leave Policy

Purpose

Employees who volunteer or are involuntarily called to serve in the ranks of the military may request a leave of absence for the duration of their Military Service. The Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA) covers all private and public employers. USERRA provides for military leaves of absence and reemployment of eligible Employees when they return from military leave for all Uniformed Services.

Policy Statement and Scope

Policy Statement: LEAD Public Schools fully supports both the letter and spirit of USERRA regulations so that our Employees and their families have peace of mind during the Employee's active service.

Scope: This policy applies to all salaried full-time Employees.

Definitions

- **Employees:** All officers and salaried full-time Employees of LEAD Public Schools.
- **Military Service:** Active duty, active and inactive duty training, and such activities as funeral honors duty performed by National Guard or reserve members. Examples of military leave include, but are not limited to, the following: reserve or National Guard encampment attendance, maneuvers, drills, training programs, state or national emergency, state of war or actual war.
- **Uniformed Services:** As defined by USERRA include the following:
 - The full-time and reserve components of the Army, Navy, Marine Corps, Air Force and Coast Guard;
 - The National Guard;
 - The Commissioned Corps of the Public Health Service; and
 - Any other category of persons designated as a uniformed service by the President in time of war or national emergency.

Procedure

- A. **Pay and Benefits:** LEAD Public Schools will continue to compensate the employee for a period of six months. Income received from the military will be deducted from the Employee's current pay after the 10th business day of the military leave. Also, the following benefits will be reduced by any primary benefits payable to Employees and their dependents by or on behalf of the United States government.

Upon approval of the leave, the employee will have the option to continue paying for their medical, dental and vision benefits, or discontinue coverage and suspend their contributions and utilize their military benefits only. Employees should communicate in writing to the Human Resources Specialist if they choose to discontinue LEAD's benefits prior to deployment, otherwise LEAD Public Schools will assume continuation of benefits with LEAD Public Schools and deductions will be deducted from the Employee's paycheck for the first six months. After the sixth month period, Employees will be responsible for submitting premium payments for the duration of the military leave. These payments should be sent to the attention of LEAD's Human Resources Specialist.

In the event of the Employee's death, all benefits will cease and LEAD Public Schools will offer COBRA to any existing covered dependents.

Life insurance and accidental death and dismemberment will continue for the duration of the Military Service, subject to any exclusion in the insurance policy agreement.

401(k) and 403 (b) deductions will continue to be withheld from pay unless the Employee elects to change the deduction with the 401k provider and 403 (b) provider. Immediately upon reemployment, the Employee may, at the Employee's election, make any or all Employee contributions that the Employee would have been eligible to make had the Employee's employment not been interrupted by Military Service. Such contributions must be made within a period that begins with the Employee's reemployment and that is not greater in duration than three times the length of the Employee's Military Service. Employees will receive all associated LEAD Public School matches for such contributions.

Spending account deductions will continue for six months unless the employee notifies the Human Resources Specialist in writing to suspend deductions. You may continue to submit claims through March 31 of the next year for only those expenses you incur through the date you suspend deductions.

Short-term illness and long-term disability and the business benefits all cease on the first day of an approved military leave of absence.

Retirement plans - Credit for service (i.e., time counted for eligibility of benefits) and benefit service will be treated as though the Employee had been continuously employed during the military leave.

Paid time off (PTO) will stop accruing the first full pay period following the military leave and begins again on the first full pay period when the Employee returns to work.

The Employee's performance review dates, related merit increases and incentives will not be impacted by the military leave.

Service credit for the retirement plans, 401(k), 403 (b), and PTO accrual will be applied for all time spent in the military upon reinstatement.

B. Requesting a Military Leave of Absence: A Request for a Military Leave of Absence can be submitted in writing to the Human Resources Department and immediate manager. The appropriate documentation should be attached to the written request and submitted to the Human Resources Department and immediate manager (i.e., orders and a copy of the employee's military paycheck, if called to active duty). If the employee chooses to utilize military benefits only, and discontinue LEAD Public School's benefit coverage and/or suspend contributions, please notify the Human Resources Specialist. No notice is required if doing so is impossible, unreasonable, or precluded by military necessity.

C. Replacing Employees on Leave Under USERRA. Returning Employees must be reemployed in the current position as if they had remained continuously employed. If reemployment in such a position is not possible, they must be reinstated in a position of equivalent pay and seniority to the position they otherwise would have returned. If a replacement is needed, temporary help may be utilized while the Employee is on military leave.

D. Returning from Leave Reinstatement. After military leave is governed by federal law in effect at the time of the leave. In no case shall the return policy for those on military leave be less than the policy for any other type of leave of absence. Employees returning from Military Service of 30 calendar days or less must report to work at the start of the next work period, allowing eight hours for travel after the end of service. Employees returning from Military Service of 31 to 180 calendar days must apply for reinstatement within 14 calendar days of concluding service. Those serving longer than 180 calendar days must apply for reinstatement within 90 calendar days of ending Military Service. The Employee must communicate their request for reinstatement in writing to the Human Resources Department within the above time frames.

Exceptions to these deadlines are possible when circumstances beyond an Employee's control prevent returning to work or applying for reinstatement within the specified period. Extensions also are permitted when Employees require convalescent time after

Military Service. In all other cases, Employees who fail to report to work or apply for reinstatement within the specified period are subject to LEAD Public School's disciplinary policy for unexcused absences.

The law also protects returning veterans from discharge, except for cause, for six months after they serve 30 to 181 calendar days. Employees who serve more than 181 calendar days cannot be discharged, except for cause, for one year after their return to work.

Federal legislation governing the reemployment rights of persons called to active military duty is subject to change, and many provisions are subject to varying interpretations. The procedural summary may not, therefore, state the law as it may apply to a particular set of facts, or at some time in the future.

The manager must notify the Human Resources Department upon the Employee's return from military leave of absence.

Contact for Questions

Any questions regarding this policy or procedure may be directed to hradp@leadpublicschools.org.

Transfer Policy and Job Change Policy

LEAD Public Schools (LPS) guidelines for internal transfer and job change are outlined below. It is important to note consideration for an internal transfer and/or job change are based on network needs and are at the discretion of the appropriate Head of Schools under consultation with LPS school managers. Talent will work closely with School leadership in cross referencing each request with available vacancies.

Note: When requesting a transfer or job change at the same school, employees should go directly to their manager. The process steps below do not apply.

Internal Transfer:

An internal transfer is defined as a school-based employee seeking to move from one school to another in the same job position.

Eligibility:

- Satisfactory rating on the most recent performance management review or TEAM evaluation and in good employment standing (not on PIP or corrective action, not being dismissed from employment).
- Employed with LEAD Public Schools for 12 months.
- Provide a valid reason for the transfer request.

Process:

- Speak with your immediate manager regarding your request to transfer. At this time, you will discuss a valid reason for the transfer request. Your manager can approve or deny the request.
- If approved, discuss with your manager which LEAD campus you would like to transfer to.
- Manager will notify the talent team that the transfer has been approved.
- Log into ADP. Go to Myself → Talent → Career Center and apply for the position.
- A member of the talent team will reach out to discuss next steps.

Job Posting: Transfer

A job posting is defined as an employee seeking a new position within the LEAD network. A new position is defined as one with a different title than the current position.

Eligibility:

- Satisfactory rating on the most recent performance management review or TEAM evaluation and not on a Performance Improvement Plan (PIP).
- Employed with LEAD Public Schools for 12 months.

Process:

- Speak with your immediate manager regarding your desire to pursue a job change and whether you meet the eligibility criteria.
- Your manager will discuss open positions within the network.
- Manager will make the talent team aware of the conversation.
- Log into ADP. Go to Myself → Talent → Career Center and apply for the position.
- A member of the talent team will reach out to discuss next steps.

****In both cases (internal transfer and job change) management reserves the right to forgo eligibility criteria if the transfer or job change is part of a development opportunity or succession plan.**

Recording Policy

Purpose

The purpose of this policy is to protect the confidential and proprietary information of LEAD Public Schools, our students and families, and the freedom of our employees to communicate freely.

Policy Statement and Scope

Policy Statement: LEAD Public Schools fully supports the confidentiality of our staff, students, and families. LEAD must comply with the Family Educational Rights and Privacy Act (FERPA) as well as other state and federal privacy laws. This compliance requires protecting confidential student education records and information from release, including protecting that information from video or tape recordings.

Scope: This policy applied to all Employees of LEAD Public Schools.

Procedure

In order to maintain confidentiality with all information and records, no person, including but not limited to employees, visitors, clients, vendors, or a representative acting on behalf of LEAD Public School, should record conversations of another without his or her prior knowledge and consent. Recordings include audio and/or video, by any means including smart phones. The devices used to record via audio or video that are prohibited are inclusive of, but are not limited to, phones, voice recorders of any kind, video cameras of any kind, and microphones. Any individual requesting to record via audio or video any interaction with any persons associated with LEAD Public Schools, will need to inform LEAD Public Schools Human Resources Department of their intention and obtain authorization. LEAD Public Schools reserve the right to refuse such requests, in their sole discretion. Furthermore, a LEAD Public School employee may refuse to be recorded and at such time may end the conversation if the asking party refuses to speak without a recording device.

Nothing in this policy is intended to prevent LEAD Public Schools employees from making recordings for security purposes, monitoring work performance or any other legitimate activity related to the safety and work of the school or network or as otherwise protected by law. A violation of this policy may result in disciplinary action, up to and including termination.

Contact for Questions

Any questions regarding this policy or procedure may be directed to hradp@leadpublicschools.org.

ACKNOWLEDGMENT FORM

I acknowledge that I have access to the Employee Manual on-line, which describes important information about LEAD Public Schools and understand that I should consult the Chief Human Resources Officer if I have any questions. I understand that this Policy has been provided to me electronically and that I may request a hard copy of this Policy at any time.

I understand that any manuals, handbooks or other personnel-related material I may receive from LEAD, such as this Policy, may be modified at any time, and does not constitute a contract of employment. This Policy supersedes any prior practices and oral or written statements. I understand that this Policy is the property of LEAD Public Schools and is for internal use only.

I have received the LEAD Public Schools Employee Manual, and I understand that it is my responsibility to read and comply with the policies contained in this handbook and any revisions made to it.

EMPLOYEE NAME (please print legibly)

EMPLOYEE SIGNATURE

DATE



LEADPUB-01

LHESS

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

10/26/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # 1298 Hub International Mid-South 3011 Armory Drive Suite 250 Nashville, TN 37204	CONTACT NAME: Lisa Hess PHONE (A/C, No, Ext): (615) 986-6123 FAX (A/C, No): E-MAIL ADDRESS: lisa.hess@hubinternational.com
	INSURER(S) AFFORDING COVERAGE INSURER A: Cincinnati Insurance Company INSURER B: StarNet Insurance Company INSURER C: INSURER D: INSURER E: INSURER F:
	NAIC # 10677 40045

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PROJECT ☐ LOC OTHER:	X		ETD0443416	7/1/2023	7/1/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 2,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	☒ AUTOMOBILE LIABILITY ☐ ANY AUTO OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY			ETD0443416	7/1/2023	7/1/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	☒ UMBRELLA LIAB ☒ OCCUR ☐ EXCESS LIAB ☐ CLAIMS-MADE DED ☒ RETENTION \$ 10,000			ETD0443416	7/1/2023	7/1/2024	EACH OCCURRENCE \$ 7,000,000 AGGREGATE \$ 7,000,000
B	☒ WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	KRM587994240	7/1/2023	7/1/2024	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Professional Liab			EME0444516	7/1/2023	7/1/2024	\$5M Occur/\$5M Aggr
A	Sexual Abuse Liabili			ETD0443416	7/1/2023	7/1/2024	\$1M Occur/\$2M Aggr

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Metropolitan Board of Public Education, 2601 Bransford Ave, Nashville, TN 37204 is Additional Insured with respects to General Liability coverage when required in a written contract.

CERTIFICATE HOLDER

CANCELLATION

Metropolitan Board of Public Education Purchasing Agent 2601 Bransford Avenue Nashville, TN 37204	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE



2022-2023 Annual Report for LEAD Public Schools

Submitted September 29, 2023

LEAD Public Schools

READY FOR COLLEGE. READY FOR LIFE.

Dwayne Tucker , CEO

2835 Brick Church Pike

Nashville, TN 37207

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c: 214-923-7062

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www.leadpublicschools.org

www.facebook.com/LEADPublicSchools

www.twitter.com/LEADSchools



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instructions:

https://www.tn.gov/content/dam/tn/education/nonpublic/chtr_sch/Annual_Report_Guidance-Charter_Operators.pdf

Introduction

LEAD Public Schools, a network of six public charter schools, serves 2,400 students in Nashville, Tennessee. LEAD schools meet or exceed the standards of traditional schools while being held accountable by local school districts and state government. By operating independently, LEAD focuses on meeting the needs of our students, families, teachers, and communities and ensures the same students traditionally left behind by these schools are ready for college and ready for life. Six schools make up the LEAD network: LEAD Brick Church (grades 5-8), LEAD Cameron (grades 5-8), LEAD Academy (grades 9-12), LEAD Southeast Middle School (grades 5-8) and High School (grades 9-12) and LEAD Neely's Bend (grades 5-8).

MISSION: Prepare ALL of our students with the knowledge and skills to succeed in college and in life.

LEAD takes great pride in a school and network culture centered on our Ethos: our students, staff members and families are all asked to lead their lives both in and outside of school with five tenets in mind: we lead because we are **committed, courageous, disciplined, self-reliant** and because we **serve others**. This character-based initiative serves as the foundation for the network's social and emotional programming, including Crew, our advisory period in which leaders and peers discuss contemporary issues, on-campus experiences and work toward building cohesive and trusting relationships at all six of our schools in order to best support and enhance a student's academic experience and outcomes.

At the end of the 2022-2023 school year, LEAD enrolled 2,356 students in six schools across four campuses. LEAD had 180 scheduled instructional days for the 2022-2023 school year.

Chief Executive Officer: Mr. Dwayne Tucker
dwayne.tucker@leadpublicschools.org

(214) 923-7062

Board of Directors Chair: Mr. Mike Honious

mike.honious@geodis.com

615-401-6482

For 2022-23 school year, LEAD was comprised of the following schools:



LEAD Academy High School

1034 First Avenue South

Nashville, TN 37210

Contact: Maggie Sneed, Principal

(615) 327-5422 (Main Office)

(615) 248-5577 (Fax Number)

maggie.sneed@leadpublicschools.org

<https://leadpublicschools.org/schools/lead-academy/>

Report Prepared By:

Jenny Sawyer

Director of Communications

256-652-1376

jennifer.sawyer@leadpublicschools.org

Oct. 1, 2023

Name of School: LEAD Academy High School			
Authorizer	Metropolitan Nashville Public Schools (MNPS)	School Hours	7:05 a.m. to 2:30 p.m.
Year Opened	2007	Next Renewal Year	2027
Year Charter Agreement Expires	2027	Current Enrollment	489
Current Number of Students on Waitlist	64	Max. Enrollment per Charter Agreement	800
Current Grade Span Served	Grades 9-12	Grade Span Approved in Charter	Grades 9-12

# Instructional Days per School Year	180
Mission Statement	LEAD Public Schools prepares all of our students with the knowledge and skills to succeed in college and in life.



LEAD Brick Church
 2835 Brick Church Pike
 Nashville, TN 37207
 Ms. Kathryn Rice McKinzie, Principal
 (615) 806-6317 (Main Office)
 (615) 806-6319 (Fax Number)
kathryn.mckinzie@leadpublicschools.org
<https://leadpublicschools.org/schools/brick-church/>

Report Prepared By:
 Jenny Sawyer
 Director of Communications
 256-652-1376
jennifer.sawyer@leadpublicschools.org
 Oct. 1, 2023

Name of School: LEAD Brick Church			
Authorizer	Achievement School District (ASD)	School Hours	8:30 a.m. - 4:30 p.m.
Year Opened	2012	Next Renewal Year	2022
Year Charter Agreement Expires	2024	Current Enrollment	254

Current Number of Students on Waitlist	38	Max. Enrollment per Charter Agreement	None; zoned-enrollment.
Current Grade Span Served	Grades 5-8	Grade Span Approved in Charter	Grades 5-12
# Instructional Days per School Year	180		
Mission Statement	LEAD Public Schools prepares all of our students with the knowledge and skills to succeed in college and in life.		

**LEAD Cameron**

1034 First Avenue South
Nashville, TN 37210

Contact: Ms. Briana Shelton, Principal
(615) 806-6320 (Main Office)
(615) 248-5577 (Fax Number)

briana.shelton@leadpublicschools.org

<https://leadpublicschools.org/schools/cameron/>

Report Prepared By:

Jenny Sawyer

Director of Communications
256-652-1376

jennifer.sawyer@leadpublicschools.org

Oct. 1, 2023

Name of School: LEAD Cameron Middle School			
Authorizer	Metropolitan Nashville Public Schools (MNPS)	School Hours	7:30 a.m. - 3:17 p.m.
Year Opened	2011	Next Renewal Year	2031

Year Charter Agreement Expires	2031	Current Enrollment	499
Current Number of Students on Waitlist	0	Max. Enrollment per Charter Agreement	None; zoned-enrollment
Current Grade Span Served	Grades 5-8	Grade Span Approved in Charter	Grades 5-8
# Instructional Days per School Year	180		
Mission Statement	LEAD Public Schools prepares all of our students with the knowledge and skills to succeed in college and in life.		



LEAD Neely's Bend

1251 Neely's Bend Road

Madison, TN 37115

Contact: Ms. Dominique Torres

(615) 645-6461 (Main Office)

(615) 645-6462 (Fax Number)

dominique.torres@leadpublicschools.org

<https://leadpublicschools.org/schools/neelys-bend/>

Report Prepared By:

Jenny Sawyer

Director of Communications

256-652-1376

jennifer.sawyer@leadpublicschools.org

Oct. 1, 2023

Name of School: LEAD Neely's Bend Middle School			
Authorizer	Achievement School District (ASD)	School Hours	8:30 a.m. to 4 p.m.
Year Opened	2015	Next Renewal Year	2025
Year Charter Agreement Expires	2025	Current Enrollment	297
Current Number of Students on Waitlist	17	Max. Enrollment per Charter Agreement	None; zoned-enrollment
Current Grade Span Served	Grades 5-8	Grade Span Approved in Charter	Grades 5-12
# Instructional Days per School Year	180		
Mission Statement	LEAD Public Schools prepares all of our students with the knowledge and skills to succeed in college and in life.		



LEAD Southeast Campus

LEAD Southeast Middle School

531 Metroplex Drive

Nashville, TN 37211

Contact: Mr. Thomas Schoen, Principal

(615) 678-0543 (Main Office)

(615) 800-8272 (Fax Number)

thomas.schoen@leadpublicschools.org

<https://leadpublicschools.org/schools/se-middle/>

Report Prepared By:

Jenny Sawyer

Director of Communications

256-652-1376

jennifer.sawyer@leadpublicschools.org

Oct. 1, 2023

Name of School: LEAD Southeast Middle School			
Authorizer	Metropolitan Nashville Public Schools	School Hours	8:50 a.m. - 4 p.m.
Year Opened	2013	Next Renewal Year	2023
Year Charter Agreement Expires	2032	Current Enrollment	481

Current Number of Students on Waitlist	57	Max. Enrollment per Charter Agreement	921**
Current Grade Span Served	Grades 5-8	Grade Span Approved in Charter	Grades 5-12
# Instructional Days per School Year	180		
Mission Statement	LEAD Public Schools prepares all of our students with the knowledge and skills to succeed in college and in life.		

LEAD Southeast High School

531 Metroplex Drive

Nashville, TN 37211

Contact: Ms. Genevieve Byrd, Principal

(615) 678-0543 (Main Office)

(615) 800-8272 (Fax Number)

genevieve.byrd@leadpublicschools.org

<https://leadpublicschools.org/schools/se-high/>

Report Prepared By:

Jenny Sawyer

Director of Communications

256-652-1376

jennifer.sawyer@leadpublicschools.org

Oct. 1, 2023

Name of School: LEAD Southeast High School			
Authorizer	Metropolitan Nashville Public Schools (MNPS)	School Hours	7:15 a.m. - 2:15 p.m.
Year Opened	2017	Next Renewal Year	2023
Year Charter Agreement Expires	2032	Current Enrollment	382
Current Number of Students on Waitlist	34	Max. Enrollment per Charter Agreement	921**

Current Grade Span Served	Grades 9-12	Grade Span Approved in Charter	Grades 5-12
# Instructional Days per School Year	180		
Mission Statement	LEAD Public Schools prepares all of our students with the knowledge and skills to succeed in college and in life.		

**Please note: LEAD Southeast is coded and authorized as a 5-12 campus, however LEAD runs them as a middle school and high school with separate leadership teams.*

***The maximum enrollment number is reflective of the entire 5-12 charter.*

Section I: Academic Performance

LEAD Academy High School

- Describe the progress made during the prior school year toward the academic goals outlined in your charter agreement. First, identify each goal or indicator. Then, for each goal or indicator, please answer the following:
 - What progress toward this goal was made over the course of the prior school year? Provide the applicable quantitative data, if available, and/or a narrative to support this analysis. If progress cannot be determined, identify the unavailable metrics that would typically support a determination.
 - If the goal or metric was met, what key levers, policies, and/or practices led to success?
 - If the goal or metric was not met, what hindered the organization's ability to attain the desired outcome?
 - How is the board planning to address any areas of weakness moving forward?
- Explain how the school adjusted instruction during the prior school year to address learning loss caused by COVID-19.
 - What methods worked best?
 - Identify specific challenges to the instructional model and how they were addressed.
- Describe any academic deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - What steps is the board taking to remedy these deficiencies?

- Please describe the 3-5 highest priority action steps the board plans to take to address any concerns about academic performance and/or to drive continuous improvement.

LEAD Academy ended the 2022-2023 school year with TVAAS composite of Level 4. LEAD Academy's overall chronic absenteeism rate was 22.4%. Proficiency and TVAAS levels for each content area are listed below:

LEAD Academy: EOC Results			
Subject	Test	Percent Meeting + Exceeding	TVAAS
English I	EOC	16.8%	Level 4
English II	EOC	29.2%	Level 5
Integrated Math I	EOC	10.57%	Level 3
Integrated Math II	EOC	9.09%	Level 1
Integrated III	EOC	7.45%	Level 3
US History	EOC	30.19%	Level 3

During the 2022-23 school year, Lead Academy's Success Rate and TVAAS improved in all areas in response to the Level 1 TVAAS during the 2021-2022 school year., LEAD Academy earned a level 4 distinction and improved Success Rates in all subject areas - some by double digits. The improvement in academic performance can be attributed to the administrative team's focus on student data analysis and reteaching, the implementation of a robust academic enrichment/tutoring program titled "Drive to Level 5," and the prioritization of reducing chronic absenteeism which had a negative impact on student achievement in the 2021-22 school year (Chronic Absenteeism ended at 42% in the 2021-2022 school year.

During the summer of 2022, the administration conducted a thorough analysis of its master schedule as a means of identifying opportunities to better align instructional practices to improve student performance outcomes. The master schedule was changed to move Biology (taught in 2021-22 as a 9th grade course) to sophomore year so students have the opportunity to engage in Ecology as freshmen to build a strong science foundation before taking Biology. Additionally, Lead Academy shifted to offering US History and US History Honors and paused AP US History for a time in order to establish high academic expectations in the Social Studies course progression. US History and US History Honors were taught by a Princeton Review trained teacher and an Instructional Manager who had demonstrated exceptional instructional practices. These changes resulted in the double digit growth in US History. To increase students' time engaging in foundational math and reading courses, Integrated I, English I, and English II were all

taught as double-blocked courses (85 minutes daily instead of 85 minutes every other day).

During the 2022-2023 school year, LEAD Academy focused on providing additional intervention support for students with learning gaps. In 22-23, all 9th - 11th graders had experienced at least 1 full year of middle school or their 9th grade year virtually; academic habits, persistence, and foundational math and reading skills all needed targeted attention and programming. To establish a baseline for scheduling interventions, Lead Academy administered NWEA MAP 3 times in the 2022-2023 school year (August, January, May) to begin plotting student growth in foundational academic skills, more appropriately and fluidly schedule intervention, and build a culture of academic success through establishing individual growth goals (IGGs) with students. Students identified as needing reading and math intervention (bottom 10-20% of screening data) were scheduled into the content area intervention courses to provide more direct instruction in a small environment, which contributed to LEAD's academic performance improvement.

Staffing concerns due to the well documented teacher shortage was a priority for the LEAD Academy administrative team. LEAD Academy retained 91% of its teachers from the 2021-22 school year and successfully filled the majority of vacancies prior to the start of the school year. Four Long Term Substitute Teachers were hired in order to provide consistency of instruction and coverage for teacher absences and in a few cases teacher vacancies. The decision was also made to provide spot bonuses to Instructional Managers and Deans who took on additional responsibilities of teaching courses in their areas of certification while a teacher vacancy existed. This decision was especially critical for our vacant ELL or ExEd positions – licensed school leaders were able to fill in these positions until full-time staff were hired.

With the implementation of Louisiana Guidebooks for ELA curriculum (started in 2020-2021) and the upcoming adoption of new high school math standards and curriculum in 2022-2023,, the LEAD Public Schools Academic and Data teams provided additional support and coaching for LEAD Academy teachers and staff. Working in partnership with the Instructional Managers, network Academic Team members were able to provide additional observations, coaching and feedback, and assessment creation to teachers. In many instances this resulted in teachers having specific areas of focused improvement. The outcomes were evidenced by the number of teachers whose observation scores improved over the course of the year and the number of teachers who earned TVAAS scores of 3 or higher at the end of the 2022-23 school year (8 teachers compared to 4 in the 2021-2022 school year).

The school administrative team anchored its priorities in improving student outcomes in all areas. The “Drive To Level 5” Campaign was the school’s tutoring and enrichment program designed to incentivize student ownership of their performance, while providing access to academic enrichment during the school day and on weekends. With the support of the Network Data Team, Lead Academy used MAP data, previous TNReady and TVAAS data, and standards-aligned assessment data to bucket students by performance and

growth and create tutoring groups based on student need. Additionally, through regular attendance data tracking and review, the attendance team provided case management for students who were historically chronic absent or who were at risk of being chronically absent for the 2022-23 school year. Case management included the creation of attendance plans individualized to each student. The use of these systems resulted in over 300 students participating in tutoring and a reduction of chronic absenteeism by 20%, which exceeded the double AMO goal for LEAD Academy.

LEAD Academy's success can be attributed to its prioritization and focus on student needs, data monitoring, culture, communication, and coaching for student outcomes. LEAD Academy retained over 90% of its teachers following the 2022-23 school year and saw growth in student and teacher end of the year feedback. The school maintained a Culture Index Score that was higher than the national average of 7.5, by earning an 8.1 on the Fall Insight Survey and a 7.8 on the Spring Insight Survey. In addition, student spring survey results highlight that students feel LEAD Academy is a good place to learn, that students have a trusting adult relationship, and that the students feel safe, supported and challenged to their best.

For the 2023-2024 school year, Lead Academy's building on the successes of the 2022-2023 school year and continuing to receive support from the Network Support team to prioritize the following action steps:

- **While the Level 4 distinction was promising, Lead Academy is focusing on earning a Level 5 and a 20%+ Success Rate for the 2023-2024 School Year.** The school will continue its Drive to Level 5 campaign, continue focusing on student data and reteaching, and continue incentivizing and celebrating student growth and achievement through regular celebrations and implementation of IGGs (Individual Growth goals) for all students.
- **In the 2023-2024 school year, Lead Academy plans to address the slower progress in Math growth (Level 2 in Numeracy in 2022-2023) through implementation of a new high school math curriculum (OpenUp Resources) and new math intervention curriculum (Transition to Algebra for Tier II, Do the Math for Tier III).** Our network Director of Math, a newly-appointed Intervention Instructional Manager at Lead Academy, and the Assistant Principal of Instruction (focused in STEM) lead the work of coaching teachers and evaluating fidelity and effectiveness.
- **Continuing to decrease Chronic Absenteeism and improve Satisfactory attendance is a priority in the 2023-2024 school year.** Lead Academy will continue implementing its attendance team, which includes initiatives like attendance plans, attendance incentives for students, the Attendance Review Board, and consistent follow-through on all compulsory attendance laws and protocols.
- **In order to be a world-class high school, Lead Academy is prioritizing building a**

culture of success around the ACT with the goal of increasing the percentage of students earning a 21 or higher by the time they graduate (currently at 4% for the class of 2024 with a goal of meeting or exceeding 16% after the October retake). Lead Academy's begun its "Run to 21+" Campaign for ACT growth which includes targeted tutoring led by staff members, incentive programs for attending tutoring and making growth growth on both the official ACT and unofficial practice tests, and implementing IGGs (Individual Growth Goals) specifically for the ACT for Juniors and Seniors.

LEAD Brick Church School

- Describe the progress made during the prior school year toward the academic goals outlined in your charter agreement. First, identify each goal or indicator. Then, for each goal or indicator, please answer the following:
 - What progress toward this goal was made over the course of the prior school year? Provide the applicable quantitative data, if available, and/or a narrative to support this analysis. If progress cannot be determined, identify the unavailable metrics that would typically support a determination.
 - If the goal or metric was met, what key levers, policies, and/or practices led to success?
 - If the goal or metric was not met, what hindered the organization's ability to attain the desired outcome?
 - How is the board planning to address any areas of weakness moving forward?
- Explain how the school adjusted instruction during the prior school year to address learning loss caused by COVID-19.
 - What methods worked best?
 - Identify specific challenges to the instructional model and how they were addressed.
- Describe any academic deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - What steps is the board taking to remedy these deficiencies?
- Please describe the 3-5 highest priority action steps the board plans to take to address any concerns about academic performance and/or to drive continuous improvement.

Brick Church focused on the strategies below during the 2022-2023 school year:

- Implementing rigorous math and ELA curriculum, along with coaching and professional development
- Providing additional intervention support for students who are behind and struggling socially/emotionally, including the MTSS tracking process
- Purchased additional intervention programs and materials to support students

Math development

- Added additional culture team members to support student development

Brick Church ended the 2022-2023 school year with a success rate of 6.5%, an increase from the 2021-22 year, and a TVAAS composite Level 3, a decrease from the Level 5 growth the prior year.

LEAD Brick Church's chronic absenteeism rate was 38.5%. Proficiency and individual content results are demonstrated in the table below.

LEAD Brick Church: TNReady Results				
Grade	Test	Subject	Percent Meeting + Exceeding	TVAAS
5th-8th	TnReady	Math	7.1%	Level 2
5th-8th	TnReady	English	6.2%	Level 3
5th-8th	TnReady	Science	10.7%	Level 3
5th-8th	TnReady	Social Studies	9.4%	Level 5

Student growth can be attributed to the intense focus on intervention in reading and math as well as increased staffing and support to ensure that each student received the differentiated instruction and social emotional support required. Additionally, teachers and instructional coaches were supported in both ELA and Math through the LEAD Public Schools Academic Team. In addition, external support for ELA implementation was provided through a partnership with TNTP.

Still, the 2022-2023 school year came with continued challenges in student attendance and staffing turnover. Placement of additional staff at LEAD Brick Church was instrumental in ensuring classes were covered as seamlessly as possible. Both new and returning teachers were provided coaching from the school's assistant principal of instruction and content level coaches. In some classes, our content coaches, assistant principal, and principal became lead or support teachers in the spring.

Based on TNReady data from the 2021-2022 school year as well as MAP data from the beginning of the 2022-2023 school year, the leadership team at LEAD Brick Church is working to ensure continued growth as well as increased achievement for students across

all content areas. Instructional managers (content coaches) continue to support teachers with provision of strong tier one instruction, and intensive reading and math intervention is provided to mitigate the effects of the pandemic.

LEAD Brick Church is receiving support from the NeST to focus on the following highest priority action steps to address our concerns about academic performance and/or to drive continuous improvement across the LEAD Network:

- In 2022-2023, LEAD continued implementation of our math and ELA curricula across all grades, and ensured teachers were supported and trained on these new core curricula. This year, we are continuing to provide robust support in math and ELA, while implementing our newly adopted common curricula in science and social studies. Positions at the Network level support science and social studies content teachers. We are also implementing rigorous data tools and analysis processes to ensure that our instructional team is continually addressing student needs.
- Data from the 2021-2022 school year continued to highlight the need for intensive reading intervention for a significant number of our students. LEAD expanded RTII programming to include more students in tiered reading intervention and adopted new scheduling in grades 5-8 to dedicate additional time to reading intervention using common curricula within each tier. A Director of MTSS supported this effort at the Network level, 6 RTII Instructional Manager positions were created to support at each school, and 18 reading interventionists have been hired to work within schools across the Network. The efficacy of this initiative is being monitored using a variety of nationally normed assessments as well as internally developed walkthrough tools. At LEAD Brick Church, our students demonstrated the highest growth in reading fluency of all LEAD schools.
- The need for consistent systems of student support was another key area of continued need as evidenced by data coming out of the 2021-2022 school year. Under the guidance of the Director of Student Supports, school support and culture systems were codified and expectations became more consistent across all schools. We established a number of consistent culture and MTSS systems at LEAD Brick Church and are continuing to streamline these systems for 2023-2024.
- As part of our continued development of teachers across the network, additional Instructional Managers were hired to coach teachers. The Academic Team implemented a coaching cohort focusing on both best practices in the art of instructional coaching as well as content specific coaching practices to increase student outcomes.

LEAD Cameron Middle School

- Describe the progress made during the prior school year toward the academic goals outlined in your charter agreement. First, identify each goal or indicator. Then, for each goal or indicator, please answer the following:
 - What progress toward this goal was made over the course of the prior school year? Provide the applicable quantitative data, if available, and/or a narrative to support this analysis. If progress cannot be determined, identify the unavailable metrics that would typically support a determination.
 - If the goal or metric was met, what key levers, policies, and/or practices led to success?
 - If the goal or metric was not met, what hindered the organization's ability to attain the desired outcome?
 - How is the board planning to address any areas of weakness moving forward?
- Explain how the school adjusted instruction during the prior school year to address learning loss caused by COVID-19.
 - What methods worked best?
 - Identify specific challenges to the instructional model and how they were addressed.
- Describe any academic deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - What steps is the board taking to remedy these deficiencies?
- Please describe the 3-5 highest priority action steps the board plans to take to address any concerns about academic performance and/or to drive continuous improvement.

LEAD Cameron ended the 2022-2023 school year with a success rate of 11.4% and a TVAAS composite Level 5. LEAD Cameron's chronic absenteeism rate was 33.8% down from a 2021-2022 rate of 36.3%. Proficiency and individual content results are demonstrated in the table below.

LEAD Cameron: TNReady Results				
Grade	Test	Subject	Percent Meeting + Exceeding	TVAAS

5th-8th	TnReady	Math	12%	Level 5
5th-8th	TnReady	English	10.9%	Level 3
5th-8th	TnReady	Science	20.8%	Level 4
5th-8th	TnReady	Social Studies	23.8%	Level 4

LEAD Cameron's exceptional growth can be attributed to multiple factors. Along with other middle schools in the LEAD network, LEAD Cameron continued to implement new ELA and math curricula. Teachers and instructional coaches were supported in both content areas through the LEAD Public Schools Academic Team. In addition, external support for ELA implementation was provided through a partnership with TNTP. An Assistant Principal position was also added (total of 3) to provide additional support to coaches and teachers in a focused, content-specific way. LEAD also expanded their culture team to include two Assistant Principals of Students. Teachers specific to LEAD Cameron's Newcomer Academy were added to support the significant population of English Learners. All staff met monthly to review data to ensure that all students were receiving the critical supports needed.

Based on data from both the 2022-2023 school year and from the beginning of year MAP results for 2023-2024, LEAD Cameron is receiving support from the NeST to focus on the following highest priority action steps to address our concerns about academic performance and/or to drive continuous improvement across the LEAD Network:

- In 2022-2023, LEAD continued with new math and ELA curricula across all grades, and ensured teachers were supported and trained on these new core curricula. This year, we are continuing to provide robust support in math and ELA, while moving towards the adoption of common curricula in science and social studies. Positions at the Network level have been added to support science and social studies content teachers and to facilitate the selection of curriculum.
- Data from the 2022-2023 school year highlighted the need for intensive reading and math intervention for a significant number of our students. LEAD expanded RTII programming to include more students in tiered reading intervention, and in tiered math intervention, and adopted new scheduling in grades 5-8 to dedicate additional time to reading and math intervention using common curricula within each tier. In 2022-2023 a Director of MTSS was hired to support this effort at the Network level, 6 RTII Instructional Manager positions were created to support at each school, and 18 reading interventionists have been hired to work within

schools across the Network. For 2023-2024 we have hired 12 math interventionists to teach math intervention.

- The need for consistent systems of student support was another key area of need highlighted by the pandemic. Under the guidance of the Director of Student Supports, school support and culture systems will be codified and expectations consistent across all schools. We have also expanded our student support teams in 2023-2024 to include Dean and Assistant Principals.
- As part of our continued development of teachers across the network, additional Instructional Managers have been hired to coach teachers. The Academic Team has developed and is implementing a coaching cohort focusing on both best practices in the art of instructional coaching as well as content specific coaching practices to increase student outcomes. This cohort has expanded to include APIs in 2023-2024.

LEAD Neely's Bend

- Describe the progress made during the prior school year toward the academic goals outlined in your charter agreement. First, identify each goal or indicator. Then, for each goal or indicator, please answer the following:
 - What progress toward this goal was made over the course of the prior school year? Provide the applicable quantitative data, if available, and/or a narrative to support this analysis. If progress cannot be determined, identify the unavailable metrics that would typically support a determination.
 - If the goal or metric was met, what key levers, policies, and/or practices led to success?
 - If the goal or metric was not met, what hindered the organization's ability to attain the desired outcome?
 - How is the board planning to address any areas of weakness moving forward?
- Explain how the school adjusted instruction during the prior school year to address learning loss caused by COVID-19.
 - What methods worked best?
 - Identify specific challenges to the instructional model and how they were addressed.
- Describe any academic deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - What steps is the board taking to remedy these deficiencies?
- Please describe the 3-5 highest priority action steps the board plans to take to

address any concerns about academic performance and/or to drive continuous improvement.

LEAD Neely's Bend ended the 2022-2023 school year with a success rate of 9.22% and a TVAAS composite Level 5 for the fourth year in a row. This year, LEAD Neely's Bend transitioned out of the ASD and into the Tennessee Charter Commission. LEAD Neely's Bend's chronic absenteeism rate was 33.3%. Proficiency and individual content results are demonstrated in the table below.

Student growth at Neely's Bend can be attributed to a strong focus on Instructional Manager and Teacher development. With only a 55% staff retention rate in 21-22 school year, LNB focused on ensuring we developed a strong platform for learning. All instructional managers received weekly development and all teachers received weekly coaching development and planning development from a content expert. Interim assessments were implemented in all content areas and allowed for teachers and instructional leaders to utilize data to best meet student needs.

Our school culture team focus on ensuring we were supporting student who fell into tier 3 RTi-B. As a school, we implemented a student needs tracker and protocol where interventions were determined for subgroups of students. In addition, we focused on building joy throughout our building both for students and staff and on our student survey increased the overall percentage of students who agree or strongly agree with the statement, "my school is joyful".

The leadership team at LEAD Neely's Bend has developed goals for the 2023-2024 school year to increase the school's overall success rate to over 14%, reduce the school's suspension rate to under 7% , and reduce chronic absenteeism to less than 25%.

LEAD Neely's Bend ended the 2022-2023 school year with a success rate of 9.1% and a TVAAS composite Level 5 for the fourth year in a row. LEAD Neely's Bend reduced their chronic absenteeism rate from a 39.4% to a 33.3% in the 2022-2023 school year. Proficiency and individual content results are demonstrated in the table below.

LEAD Neely's Bend: TNReady Results				
Grade	Test	Subject	Percent Meeting + Exceeding	TVAAS
5th-8th	TnReady	Math	8.3%	Level 4
5th-8th	TnReady	English	9.9%	Level 5

5th-8th	TnReady	Science	13.6%	Level 4
5th-8th	TnReady	Social Studies	16.7%	Level 4

LEAD Southeast

LEAD Southeast is technically considered one school, and state accountability reports reflect this. Within the LEAD Network, however, it is viewed as LEAD Southeast Middle School (grades 5-8) and LEAD Southeast High School (grades 9-12). Overall, LEAD Southeast ended the 2022-2023 school year with a TVAAS composite Level 5. LEAD Southeast's overall chronic absenteeism rate was 18.6% Proficiency and individual content results will be discussed in accordance with tier level focus.

LEAD Southeast Middle School

- Describe the progress made during the prior school year toward the academic goals outlined in your charter agreement. First, identify each goal or indicator. Then, for each goal or indicator, please answer the following:
 - What progress toward this goal was made over the course of the prior school year? Provide the applicable quantitative data, if available, and/or a narrative to support this analysis. If progress cannot be determined, identify the unavailable metrics that would typically support a determination.
 - If the goal or metric was met, what key levers, policies, and/or practices led to success?
 - If the goal or metric was not met, what hindered the organization's ability to attain the desired outcome?
 - How is the board planning to address any areas of weakness moving forward?
- Explain how the school adjusted instruction during the prior school year to address learning loss caused by COVID-19.
 - What methods worked best?

- Identify specific challenges to the instructional model and how they were addressed.
- Describe any academic deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - What steps is the board taking to remedy these deficiencies?
- Please describe the 3-5 highest priority action steps the board plans to take to address any concerns about academic performance and/or to drive continuous improvement.

Achievement and growth scores for core content areas are listed below.

LEAD Southeast Middle School's achievement and growth scores outpaced many district middle schools.

LEAD Cameron: TNReady Results				
Grade	Test	Subject	Percent Meeting + Exceeding	TVAAS
5th-8th	TnReady	Math	22.9%	Level 5
5th-8th	TnReady	English	16.1%	Level 1
5th-8th	TnReady	Science	31.7%	Level 5
5th-8th	TnReady	Social Studies	32.8%	Level 5

Along with other middle schools in the LEAD network, LEAD Southeast was in year 2 of implementing ELA and math curricula. Teachers and instructional coaches were supported in both content areas through the LEAD Public Schools Academic Team. In addition, external support for ELA implementation was provided through a partnership with TNTP. Internally LEAD Southeast hired additional instructional managers to assist with all subject areas. Before school academic programming was offered through the LEAPS program and after school programming was provided through two different organizations.

The 2022-2023 school year came with challenges of a new principal and continued levels of chronic absenteeism that were double pre-pandemic rates. The additional staff at LEAD Southeast Middle School were instrumental in ensuring CA reduction and the seamless coverage of classes and high levels of instruction in all subject areas. All subject areas

improved in absolute performance and LSEMS outperformed the district and the state in multiple grade level subject areas.

In 23-24 LSE continues to lean into its strong culture. The school retained 85%+ of its staff and has started the year by increasing the number of students testing at grade level or above by 11%. We believe that our continued investment in staff to reduce Chronic Absenteeism will result in less than 10% of students being CA this year.

LEAD Southeast High School

- Describe the progress made during the prior school year toward the academic goals outlined in your charter agreement. First, identify each goal or indicator. Then, for each goal or indicator, please answer the following:
 - What progress toward this goal was made over the course of the prior school year? Provide the applicable quantitative data, if available, and/or a narrative to support this analysis. If progress cannot be determined, identify the unavailable metrics that would typically support a determination.
 - If the goal or metric was met, what key levers, policies, and/or practices led to success?
 - If the goal or metric was not met, what hindered the organization's ability to attain the desired outcome?
 - How is the board planning to address any areas of weakness moving forward?
- Explain how the school adjusted instruction during the prior school year to address learning loss caused by COVID-19.
 - What methods worked best?
 - Identify specific challenges to the instructional model and how they were addressed.
- Describe any academic deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - What steps is the board taking to remedy these deficiencies?
- Please describe the 3-5 highest priority action steps the board plans to take to address any concerns about academic performance and/or to drive continuous improvement.

Achievement and growth scores for core content areas are listed below. LEAD Southeast High School outperformed many area high schools in both growth and achievement.

LEAD Southeast HS: EOC Results			
Subject	Test	Percent Meeting + Exceeding	TVAAS
English I	EOC	18.55%	Level 5
English II	EOC	50.5%	Level 5
Integrated Math I	EOC	22%	Level 5
Integrated Math II	EOC	14.92%	Level 3
Integrated III	EOC	17.8%	Level 3
Biology	EOC	39.8%	Level 5
US History	EOC	42.67%	Level 5

During the 2022-2023 school year, LEAD Southeast focused on providing additional intervention and support for students with learning gaps. This was the first year of an extended intervention program in which students were placed based on their MAP scores. Teacher PD was administered monthly with a focus on diverse learners, interventions, accommodations and modifications.

LEAD Southeast continued in its 2nd year with its math and ELA curriculum. In both curricula writing was a focus as well as student discourse. Teacher professional development included several ways these two focus areas could be utilized in the classroom as well as how to support the school's diverse learners. The LEAD Public Schools Academic team analyzed classroom instruction at 4x during the year giving feedback to school leadership on how to increase student engagement.

LEAD Southeast High School continues to receive support on the following highest priority action steps to address concerns about academic performance and to drive towards continuous improvement across the LEAD network.

- 2022-2023, LEAD entered year 2 of the new math and ELA curricula across all grades, and ensured teachers were supported and trained on these new core curricula. This year, we are continuing to provide robust support in math and ELA, while moving towards the adoption of common curricula in science and social studies. Positions at the Network level were added to support science and social studies content teachers and to facilitate the selection of curriculum.
- Data from the 2020-2021 school year highlighted the need for intensive reading intervention for a significant number of our students. LEAD expanded RTII programming to include more students in tiered reading intervention and adopted

new scheduling in grades 5-8 to dedicate additional time to reading intervention using common curricula within each tier. A Director of MTSS was hired to support this effort at the Network level, 6 RTII Instructional Manager positions were created to support at each school, and 18 reading interventionists have been hired to work within schools across the Network. The efficacy of this initiative is being monitored using a variety of nationally normed assessments as well as internally developed walkthrough tools.

- The need for consistent systems of student support was another key area of need highlighted by the pandemic. Under the guidance of the Director of Student Supports, school support and culture systems will be codified and expectations consistent across all schools.
- As part of our continued development of teachers across the network, additional Instructional Managers have been hired to coach teachers.

Section II: School Operations

- Describe the progress made during the prior school year toward any operational goals outlined in your charter agreement.
- Complete the table in Subsection I for identifying members of the governing board for the prior school year. In addition, please answer the following question:
 - What turnover, if any, has occurred on the school's governing board?
- Complete the table in Subsection II for identifying members of school leadership for the prior school year. In addition, please answer the following questions:
 - What turnover in school leadership, if any, occurred during the prior school year?
 - What changes in school leadership structures, if any, occurred during the prior school year?
- If part of a charter management organization (CMO) or network of schools, please complete the table in Subsection III for identifying members of network leadership for the prior school year. In addition, please answer the following questions:
 - What turnover in network leadership, if any, occurred during the prior school year?
 - What changes in network leadership structures, if any, occurred during the prior school year?
- Describe any operational deficiencies identified in authorizer performance frameworks or provided in other notices of concern.
 - What steps is the board taking to remedy these deficiencies?
- Complete the student attrition table in Subsection IV, outlining reasons students withdrew over the course of the prior school year. Do not include student names or initials. Referencing the data included in the chart, please answer the following:
 - How does the school track the reasons for student attrition?

- How does that data inform school planning?
 - What steps will the school take to gauge and reduce student attrition in the prior school year?
- Briefly summarize the parent and community engagement efforts undertaken by the school during the prior school year.
 - How did the school engage parents over the course of the year?
 - What community partnerships were cultivated or maintained?

LEAD Academy:

The operational goals for the 2022-23 school year focused on facility enhancements to meet the instructional and environmental needs of students and staff. LAHS remains located within the LEAD Cameron building; several facilities upgrades, including enhanced HVAC systems, classroom additions; as well as painting and school branding were completed this year, which aligns with this area of focus. LAHS exceeded its enrollment target of 474 students which is the maximum number of students the school may serve given current facilities constraints.

Please see Appendix A for governing Board and school leadership information for the 2022-2024 school year. In the 22-23 School Year, LEAD added one new member of the governing board. Dr. Tony Majors entered his second year as Principal of LEAD Academy High School with a focus on achieving academic success and growth for all learners. Dr. Majors brought numerous years of school and system administration experience to his role as Principal, including serving as the former Principal of Glenclyff High School. Assistant Principal of Students, Courtney McEwen was promoted to a network position as the new CTE/Director of College Counseling. Dr. Majors chose to select two Deans (Sean Leuders and Brittney Boucher) as opposed to having one Assistant Principal of Students.

Authorizer performance framework from MNPS evidences LEAD Academy meeting expectations in all operational categories; LEAD Academy has not received any notices of concern.

Please see Appendix B for student attrition and related information. Upon withdrawal from our school, the reasons for withdrawal are entered and tracked into our student information system. As a part of our on-going engagement efforts, the Family and Community Engagement (FACE) Team spent 2022-2023 working to strengthen relationships with families and deepening its connection to community organization. The FACE team spearheaded community canvassing, attended community events, conducted home visits, led food and clothing drives, and expanded communication with families by publishing a monthly newsletter that was highly valued by families based on feedback provided. We continue to monitor student attrition rates to ensure they are less than or equivalent to our peer schools; and to gain a better understanding of the factors

influencing student attrition.

LEAD Academy's family engagement efforts were led by our family and community engagement coordinator. With a goal of successfully engaging 80% of families in our school at least once, LEAD Academy High School closed the year out with 87% of families successfully engaged through parent and student-led conferences, family leadership team meetings, and a number of community events as a part of our community engagement efforts.

At LEAD Academy, we had a number of family engagement initiatives tied to our "Serve Others" ethos: our Serve Others Stations which served more than 100 students throughout last school year and our Service Club which is a way for our students to work together to give back to the Nashville community by volunteering at local organizations. Each of our LEAD campuses offered onsite COVID testing upon request, take home tests were provided for staff, and masks were available for all stakeholders requesting them.

Our largest event for 22-23, outside of Senior Signing Day and Graduation, was our student-led conferences. An intentional effort was made to include more community partners in student-led conferences this year. Big Brothers/Big Sisters, The Links Hendersonville, as well as other network and community members, participated in the conferences for students who were unable to attend. During these conferences, students are responsible for heading up their own academic progress conferences, instead of parents and teachers leading the conversation. The student support team and Family and Engagement Coordinators welcomed our families, passed out swag items and made all parties feel welcomed.. Throughout the school year, we surveyed families bi-weekly through Possip as a part of our customer experience work, and utilized that data to inform our daily operations and family engagement efforts.

Community partnerships include Song for Sounds, Meharry Medical College, University School of Nashville, Big Brothers/Big Sisters, The Links Hendersonville, The Cameron Alumni Association, and Nashville Electric Company.

LEAD Southeast:

In terms of operational goals, student health and safety remained a core priority of operations, especially upon return to in person learning. LSE remains located at the Metroplex campus. Several facilities upgrades, including a major plumbing upgrade, were completed this year. LSE met its enrollment target of 863 students, which fills the facility.

Please see Appendix A for governing Board and school leadership information for the 2022-2024 school year. In the 22-23 School Year, LEAD added one new member of the governing board. Genevieve Byrd entered her second year as Principal of LEAD Southeast High School to replace the outgoing Principal.

Authorizer performance framework from MNPS evidences LEAD Southeast meeting expectations in all operational categories; LEAD Southeast has not received any notices of concern.

Please see Appendix B for student attrition and related information. Upon withdrawal from our school, the reasons for withdrawal is entered and tracked into our student information system. As a part of our on-going engagement efforts, the Family and Community Engagement (FACE) Team spent 2022-2023 working to better understand which families enrolled and withdrew from LEAD schools. We consistently reviewed our network withdrawals; categorizing and addressing them based on ones being within our control (disciplinary concerns, cultural concerns, expectations not being met) and those outside of our control (moving out of district). We continue to monitor student attrition rates to ensure they are less than or equivalent to our peer schools. Net attrition and network mobility are two key data metrics we measure to gauge the effectiveness of our enrollment management systems and processes. For 23-24, we are incorporating a new manager to ensure that we are enhancing these efforts by implementing a more intentional customer experience journey map to ensure that all LEAD families are successfully engaged throughout their experience at LEAD.

Every year, our LEAD campuses commit to providing a supportive environment to our students and families. We continue to prioritize partnering with our students and families in providing a rich and complete academic experience. This year, we set new targets to build on last year's "meaningfully engaged" metrics and worked diligently to ensure all our families met this target. This metric states that every LEAD family is "successfully engaged" at least once, and "meaningfully engaged" three or more times throughout the academic school year. In addition to our monthly parent meetings, our campuses hosted monthly meetings with parent leaders to ensure a regular dialogue and alignment around family expectations. Our school utilized Possip, a platform that allows quick feedback from families, to strengthen the communication channel between school leadership and families. Finally, in 22-23, LEAD remained committed to our Serve Other Stations (SOS) which allow our families to reach out if they are in need of assistance with food, household items, internet connectivity and more. We enhanced these efforts by implementing our "Ethos Exemplified" holiday outreach and gift giving campaign and also implemented Care Portal to support our families facing more chronic needs like rental assistance, total home loss, and homelessness. Community partnerships include the Nashville International Center for Empowerment, Davidson County Sheriff's Office (SAAFE), Project Play Therapy, LLC, Metro Nashville Public Health Department, Meharry

Medical College School of Dentistry, Camel Express Carwash, Braces by Dr. Ruth, Planet Fitness, and Caron Treatment Center.

LEAD Cameron:

In terms of operational goals, student health and safety remained a core priority of operations, especially upon return to in person learning. Several facilities and security upgrades, including new fencing, were completed this year. LC met its enrollment target of 499 students, which fills the facility.

Please see Appendix A for governing Board and school leadership information for the 2022-2024 school year. In the 22-23 School Year, LEAD added one new member of the governing board.

Authorizer performance framework from MNPS evidences LEAD Cameron meeting expectations in all operational categories; LEAD Cameron has not received any notices of concern.

Please see Appendix B for student attrition and related information. Upon withdrawal from our school, the reasons for withdrawal is entered and tracked into our student information system. As a part of our on-going engagement efforts, the Family and Community Engagement (FACE) Team spent 2021-2022 working to better understand which families enrolled and withdrew from LEAD schools. We consistently reviewed our network withdrawals; categorizing and addressing them based on ones being within our control (disciplinary concerns, cultural concerns, expectations not being met) and those outside of our control (moving out of district). We continue to monitor student attrition rates to ensure they are less than or equivalent to our peer schools.

LEAD Cameron's family engagement efforts were led by our family and community engagement coordinator. With a goal of successfully engaging 80% of families at least once, LEAD Cameron closed the year out with 74% of families successfully engaged through parent conferences, student-led conferences, family leadership team meetings, and a number of cultural events representing our diverse community. Each of our LEAD campuses offered a robust family engagement calendar infused with diversity initiatives and opportunities like surveying, parent teacher conferences, and event attendance to offer a wide range of activities to successfully engage with our campuses.

Our largest event was our campus resource fair which brought more than 20 community organizations to campus and provided a central space for families to learn about and engage with our broader Nashville community. Throughout the school year, we surveyed

families bi-weekly through Possip as a part of our customer experience work, and utilized that data to inform our daily operations and family engagement efforts.

Community partnerships include TIRRC, Second Harvest Food Bank of Middle Tennessee, Caron Foundation, TN Voices for Children, Meharry Medical College, University School of Nashville, Mrs. Grissom's Panini Grill.

LEAD Brick Church:

In terms of operational goals, student health and safety remained a core priority of operations. LEAD Brick Church expanded its security staff hours this year in order to provide a more robust security presence on campus. LEAD Brick Church is a zoned enrollment school and continues to enroll students from its feeder elementaries, as well as from families wishing to enroll from outside its zone. Current enrollment is 249, below building capacity but within our budgetary expectations.

Last year, MNPS made the decision to rezone its 5th grade into elementary, greatly reducing the 5th grade middle school enrollment at LEAD Brick Church. As a result, enrollment was below our expected 240 students. However, staff was able to be redeployed throughout the building to align staffing needs with the reduced student enrollment.

Please see Appendix A for governing Board and school leadership information for the 2022-2024 school year. In the 22-23 School Year, LEAD added one new member of the governing board. Kathryn McKinzie was named Principal of LEAD Brick Church to replace the outgoing Principal. McKinzie brought numerous years of charter school Principalship experience into her role as Principal.

Our authorizer, the Achievement School District, has not yet released any authorizer performance frameworks for the 22-23 School Year and we have not received any notices of concern. However, we do not anticipate any operational deficiencies.

Please see Appendix B for student attrition and related information. Upon withdrawal from our school, the reasons for withdrawal is entered and tracked into our student information system. As a part of our on-going engagement efforts, the Family and Community Engagement (FACE) Team spent 2022-2023 working to better understand which families enrolled and withdrew from LEAD schools. We consistently reviewed our network withdrawals; categorizing and addressing them based on ones being within our control (disciplinary concerns, cultural concerns, expectations not being met) and those outside of our control (moving out of district). We continue to monitor student attrition rates to ensure they are less than or equivalent to our peer schools.

Every year, our LEAD campuses commit to providing a supportive environment to our

students and families. We continue to prioritize partnering with our students and families in providing a rich and complete academic experience. This year, we set new targets to build on last year's "meaningfully engaged" metrics and worked diligently to ensure all our families met this target. This metric states that every LEAD family is "successfully engaged" at least once, and "meaningfully engaged" three or more times throughout the academic school year. In addition to our monthly parent meetings, our campuses hosted monthly meetings with parent leaders to ensure a regular dialogue and alignment around family expectations. Our school utilized Possip, a platform that allows quick feedback from families, to strengthen the communication channel between school leadership and families. Finally, in 22-23, LEAD remained committed to our Serve Other Stations (SOS) which allow our families to reach out if they are in need of assistance with food, household items, internet connectivity and more. We enhanced these efforts by implementing our "Ethos Exemplified" holiday outreach and gift giving campaign and also implemented Care Portal to support our families facing more chronic needs like rental assistance, total home loss, and homelessness. Community partnerships include Meharry Medical College, Babbs for Judge, Metro Health Department, Davidson County Sheriff Department, and The Caron Foundation.

LEAD Neely's Bend

In terms of operational goals, student health and safety remained a core priority of operations. LEAD Neely's Bend expanded its security staff hours this year in order to provide a more robust security presence on campus. LEAD Neely's Bend is a zoned enrollment school and continues to enroll students from its feeder elementaries, as well as from families wishing to enroll from outside its zone. Current enrollment is 297, which is a decrease from the prior year, primarily driven by the district change of moving 5th grade into elementary schools.

Please see Appendix A for governing Board and school leadership information for the 2022-2024 school year. In the 22-23 School Year, LEAD added one new member of the governing board. No school leadership changes were made.

Our authorizer, the Achievement School District, has not yet released any authorizer performance frameworks for the 22-23 School Year and we have not received any notices of concern. However, we do not anticipate any operational deficiencies.

Please see Appendix B for student attrition and related information. Upon withdrawal from our school, the reasons for withdrawal is entered and tracked into our student information system. As a part of our on-going engagement efforts, the Family and Community Engagement (FACE) Team spent 2021-2022 working to better understand which families enrolled and withdrew from LEAD schools. We consistently reviewed our network withdrawals; categorizing and addressing them based on ones being within our

control (disciplinary concerns, cultural concerns, expectations not being met) and those outside of our control (moving out of district). We continue to monitor student attrition rates to ensure they are less than or equivalent to our peer schools.

Every year, our LEAD campuses commit to providing a supportive environment to our students and families. We continue to prioritize partnering with our students and families in providing a rich and complete academic experience. This year, we set new targets to build on last year's "meaningfully engaged" metrics and worked diligently to ensure all our families met this target. This metric states that every LEAD family is "successfully engaged" at least once, and "meaningfully engaged" three or more times throughout the academic school year. In addition to our monthly parent meetings, our campuses hosted monthly meetings with parent leaders to ensure a regular dialogue and alignment around family expectations. Our school utilized Possip, a platform that allows quick feedback from families, to strengthen the communication channel between school leadership and families. Finally, in 22-23, LEAD remained committed to our Serve Other Stations (SOS) which allow our families to reach out if they are in need of assistance with food, household items, internet connectivity and more. We enhanced these efforts by implementing our "Ethos Exemplified" holiday outreach and gift giving campaign and also implemented Care Portal to support our families facing more chronic needs like rental assistance, total home loss, and homelessness. Community partnerships include the Caron Foundation, Davidson County Sheriff Department, TIRRC, and Second Harvest Food Bank of Middle Tennessee.

Subsection I: Governing Body Leadership

BOARD MEMBERS FOR THE 2022-2023 SCHOOL YEAR			
Name	Position on the Board	Email Address	Length of term (start and end date)
Mike Honious	Chairman	mike.honious@geodis.com	2/12/19 - Present
Dwayne Tucker	Director/CEO	dtucker615@gmail.com	11/2/11 - Present
Carter Paine	Director	carterpaine@gmail.com	8/16/16 - Present
Jonathan Dyke	Director	jonathan.dyke@hobanroadadventures.com	8/20/21 - Present
Dr. Bryan Fisher	Director	bfisher@tsclinic.com	10/19/21 - Present
Valerie Hayes	Director	kyra10312002@yahoo.com	12/1/19 - Present
Rob Keller	Director	robkeller59@gmail.com	12/1/19 - Present
Earl Lattimore	Director/Parent Rep.	elattimo007@gmail.com	9/30/13 - Present
Annette Little	Director	annette.little@lipscomb.edu	8/18/15 - Present
Jerome Oglesby	Director	joglesby@deloitte.com	10/9/12 - Present
Linda Pannock	Director	Linda.Pannock@ankura.com	12/1/19 - Present

Jimmy Patton	Director	jimmy.patton@rogersgroupinc.com	9/30/13 - Present
Alex Ryerson	Director	aryerson@luxorcap.com	12/1/19 - Present
Don Williamson	Director	doncompass58@gmail.com	12/12/17 - Present
Jim Vesterman	Director	jimvesterman@gmail.com	2/9/22 - Present

Subsection II: School Leadership

LEAD ACADEMY SCHOOL LEADERSHIP ROSTER FOR THE 2022-2023 SCHOOL YEAR			
Name	Title	Email Address	Start Date
Dr. Tony Majors	Principal	tony.majors@leadpublicschools.org	July 2021
Maggie Sneed	Assistant Principal of Instruction	maggie.sneed@leadpublicschools.org	July 2014
Sean Lueders	Dean of Culture	sean.lueders@leadpublicschools.org	December 2018
Brittney Boucher	Dean of Culture	brittney.boucher@leadpublicschools.org	January 2023
Maggie Stampley	Director of Operations	maggie.stampley@leadpublicschools.org	July 2013

LEAD BRICK CHURCH SCHOOL LEADERSHIP ROSTER FOR THE 2022-2023 SCHOOL YEAR			
Name	Title	Email Address	Start Date
Kathryn Rice McKinzie	Principal	kathryn.mckinzie@leadpublicschools.org	August 2021
Jauriustee Brooks	Assistant Principal of Students	jauriustee.brooks@leadpublicschools.org	June 2022
Lemuel Holifield	Assistant Principal of Instruction	kunbi.adehule@leadpublicschools.org	July 2022
Mercedes Fanning	Director of Operations	mercedes.fanning@leadpublicschools.org	July 2018

LEAD CAMERON SCHOOL LEADERSHIP ROSTER FOR THE 2022-2023 SCHOOL YEAR			
Name	Title	Email Address	Start Date
Briana Shelton	Principal	briana.shelton@leadpublicschools.org	July 2015
Abby Upperman	Assistant Principal of Instruction	abby.upperman@leadpublicschools.org	July 2017

Courtney Proffit	Assistant Principal of Students	courtney.proffit@leadpublicschools.org	July 2017
Ebony Freeman	Assistant Principal of Students	ebony.freeman@leadpublicschools.org	July 2017
Maggie Stampley	Director of Operations	maggie.stampley@leadpublicschools.org	July 2013

LEAD NEELY'S BEND SCHOOL LEADERSHIP ROSTER FOR THE 2022-2023 SCHOOL YEAR

Name	Title	Email Address	Start Date
Dominique Torres Smith	Principal	dominique.torres@leadpublicschools.org	July 2017
Kelsey Waynick	Assistant Principal of Instruction	kelsey.waynick@leadpublicschools.org	June 2022
Ryan MacDonald	Assistant Principal of Students	ryan.macdonald@leadpublicschools.org	July 2017
Alma McDaniel	Director of Operations	alma.mcdaniel@leadpublicschools.org	June 2015

LEAD SOUTHEAST LEADERSHIP ROSTER FOR THE 2022-2023 SCHOOL YEAR

Name	Title	Email Address	Start Date
Genevieve Byrd	Principal, LSEHS	genevieve.byrd@leadpublicschools.org	July 2021
Tom Gilroy	Assistant Principal of Instruction, LSEHS	thomas.gilroy@leadpublicschools.org	June 2022
Shandra West-Currie	Dean of Students, LSEHS	shandra.west-currie@leadpublicschools.org	July 2018
Jordan Wedel	Director of Operations, LSEHS	jordan.wedel@leadpublicschools.org	June 2019
Tom Schoen	Principal, LSEMS	thomas.schoen@leadpublicschools.org	July 2015
Jonathan Brocco	Assistant Principal of Instruction, LSEMS	jonathan.brocco@leadpublicschools.org	July 2020
Delano James	Assistant Principal of Students, LSEMS	delano.james@leadpublicschools.org	July 2017
Jordan Wedel	Director of Operations, LSEMS	jordan.wedel@leadpublicschools.org	June 2019

Subsection III: Network Leadership

LEAD NETWORK LEADERSHIP ROSTER FOR THE 2022-2023 SCHOOL YEAR

Name	Title	Email Address	Start Date

Dwayne Tucker	CEO	dwayne.tucker@leadpublicschools.org	July 2018
Adrienne Useted	Chief Operating Officer, Interim	adrienne.useted@leadpublicschools.org	July 2012
LaVoe Mulgrew	Head of Schools	lavoe.mulgrew@leadpublicschools.org	June 2010
Tait Danhausen	Head of Schools	tait.danhausen@leadpublicschools.org	July 2011
Adrienne Useted	Chief Strategy Officer	adrienne.useted@leadpublicschools.org	July 2012
Nic Frank	Chief Human Resources Officer	nicolas.frank@leadpublicschools.org	April 2014
Mary Laurens Minich	Chief Academic Officer	mary.minich@leadpublicschools.org	February 2021
Ashley Montgomery	Chief Financial Officer	ashley.montgomery@leadpublicschools.org	July 2018
Eloise Alexis	VP of Development	eloise.alexis@leadpublicschools.org	September 2019
Corey Burton	Director of Enrollment and Family Engagement	corey.burton@leadpublicschools.org	May 2018
Jenny Sawyer	Director of Communications	jennifer.sawyer@leadpublicschools.org	August 2022

Subsection IV: Student Attrition and Mobility Information

Complete the student attrition table in Appendix B, outlining reasons students withdrew over the course of the prior school year.

LEAD Academy High School

Reason	# of students
Moved out of district or state	0
Transportation	0
Concerned with academic expectations	0
Concerned with discipline practices	0
Expelled	0
Withdrawn due to breach of behavior agreement (but not expelled)	0
Unknown	12
Other (please specify)	Change of Address = 9

	Other Charter = 3 No Show/Drop Out Investigation = 0
Total # of Students Withdrawn	24
Student Attrition Rate (%)	-1%

LEAD Southeast

Reason	# of students
Moved out of district or state	5
Transportation	0
Concerned with academic expectations	0
Concerned with discipline practices	0
Expelled	0
Withdrawn due to breach of behavior agreement (but not expelled)	0
Unknown	0
Other (please specify)	Change of Address = 16 Other Charter = 25 Non-Public School Transfer = 4
Total # of Students Withdrawn	50
Student Attrition Rate (%)	-5%

LEAD Cameron

Reason	# of students
Moved out of district or state	14
Transportation	8
Concerned with academic expectations	0
Concerned with discipline practices	0

Expelled	0
Withdrawn due to breach of behavior agreement (but not expelled)	0
Unknown	0
Other (please specify)	Change of Address = 58 Other Charter = 4 0- Dropout Investigation 0-Deceased 0-Non-public School Transfer 0-Home School
Total # of Students Withdrawn	84
Student Attrition Rate (%)	-3%

LEAD Neelys Bend

Reason	# of students
Moved out of district or state	21
Transportation	9
Concerned with academic expectations	0
Concerned with discipline practices	0
Expelled	0
Withdrawn due to breach of behavior agreement (but not expelled)	0
Unknown	0
Other (please specify)	Change of Address = 48 Other Charter = 17
Total # of Students Withdrawn	95
Student Attrition Rate (%)	4%

LEAD Brick Church

Reason	# of students
Moved out of district or state	38
Transportation	2
Concerned with academic expectations	0
Concerned with discipline practices	0
Expelled	0
Withdrawn due to breach of behavior agreement (but not expelled)	0
Unknown	0
Other (please specify)	Change of Address = 21 Other Charter = 0 3- Drop Out Investigation 5 -Non-public Transfer 1-Non-Tn Virtual School
Total # of Students Withdrawn	70
Student Attrition Rate (%)	-2%

Section III: School Finance

- Describe the progress made during the prior school year toward any financial goals outlined in your charter agreement.
- Provide a detailed accounting, including the amounts and sources, of funds other than those funds received under per-pupil state and local funds and federal formula allocations. Include any funds received from:
 - Direct federal grants,
 - Grants, gifts, or donations from any private sources (identified by source), and

- State funds appropriated directly to support the public charter school, such as BEP capital outlay.
- Describe any financial deficiencies identified in authorizer performance frameworks or other notices of concern over the past year.
 - What steps is the board taking to remedy these deficiencies?
- Identify the total amount and percentage of the annual budget expended upon facilities, including renovations and improvements, maintenance and repairs, and lease or mortgage payments.
- Please attach a copy of the most recent annual audit for the school.
- If the annual audit identified any internal control deficiencies or material weakness, please outline the corrective actions being taken to remedy the deficiencies

LEAD Public Schools continues to be in a strong financial position as described in detail in our annual audits, all of which are accessible on our website at www.leadpublicschools.org, within the "Public Information" section. In the year 2022, LEAD achieved a clean audit, building upon a track record of multiple years with budget surpluses that have fortified our cash reserves. We have consistently met financial compliance requirements, promptly submitting annual budgets and audited financial statements to both authorizers and the state. Notably, LEAD has received no notices of concern, financial deficiencies, or material weaknesses identified by either our authorizer or our auditors.

Direct Federal Grants include the TSL grant.

21-22 School Year Amount- Audited Amount

1	21.22 AUDITED Numbers	
2		
3	Row Labels	Sum of Balance
4	TSL	-\$1,728,962
5	Grand Total	-\$1,728,962
6		

LEAD Public Schools receives several public pass through grants provided either by the State Dept of Education, Metro Nashville Public Schools and the Achievement School District.

21.22 AUDITED Numbers	
Row Labels	Sum of Balance
Bridge Summer Program	-\$169,001
Charter School Facilities	-\$678,207
Epidemiology and Laboratory Capacity Grant	-\$93,020
Esser	-\$6,937,019
LEAPS Grant	-\$35,714
Learning Camp Transportation	-\$33,292
Summer Supplemental Learning	-\$64,621
Turnaround Action Grant	-\$61,745
Grand Total	-\$8,072,618

Finally, LEAD fundraises from private sources and receives earned revenue other than BEP.

<u>Funding Source</u>	<u>Allocation</u>
SCORE	\$ 400,000
Scarlett Family Foundation	\$ 270,000
Wisnoski Family Fund	\$ 200,000
Michael and Susan Dell Foundation	\$ 125,000
Charter School Growth Fund	\$ 100,000
Anne Potter Wilson Foundation	\$ 50,000
Asurion / Compassion Forward	\$ 25,000
Ryerson Family Fund	\$ 25,000
Tucker Family Fund	\$ 25,000
<u>Other Gifts from Individual Donors</u>	<u>\$ 301,662</u>
	\$1,521,662

Further details for all revenue may be found in the annual financial audit.

No financial deficiencies or notices of concern have been identified in the 21-22 school year.

Facilities expenditures for the 21-22 School Year were \$3,541,643 or 6.8% of budgeted revenue. Facilities expenditures include rent, debt service, utilities, custodial services, repairs & maintenance, and capital improvements.

The 22-23 annual audit will be finalized and submitted to the TN Comptroller's Office, our authorizers and posted publicly on our website by the December 31, 2022 deadline. Attached is our most recent completed audit.

Our annual financial audit has not identified any internal control deficiencies or material weaknesses.



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

**LEAD Southeast Elementary
New Charter School Application Budget Template
Proposed School Information**

Proposed School Name	LEAD Southeast Elementary
Lead Sponsor Name	Adrienne Useted
Lead Sponsor E-mail Address	adrienne.useted@leadpublicschools.org
Lead Sponsor Phone Number	615-775-5254
CMO/EMO Affiliation	LEAD Public Schools
Proposed Authorizer	MNPS
Proposed Opening Grade Level(s)	K-2
Proposed Final Grade Level(s)	K-5
Proposed First Year of Operations	2025-26

	Year 1	Year 2	Year 3	Year 4	Year 5
Anticipated Enrollment	130	190	250	310	335

Note: These cells auto-populate after completing Tab 2.

**LEAD Southeast Elementary
New Charter School Application Budget Template
Student Assumptions**

Enrollment Assumptions

Year 1	Year 2	Year 3	Year 4	Year 5
2025-26	2026-27	2027-28	2028-29	2029-30

Pre-Kindergarten (Informational Only)

0	0	0	0	0

Kindergarten

60	60	60	60	60

1st Grade

35	60	60	60	60

2nd Grade

35	35	60	60	60

3rd Grade

0	35	35	60	60

4th Grade

0	0	35	35	60

5th Grade

0	0	0	35	35

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)

130	190	250	310	335

Change in Net Enrollment

130	60	60	60	25

**LEAD Southeast Elementary
New Charter School Application Budget Template
Student Assumptions**

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	2	3	3	3	3
2nd Grade	2	2	3	3	3
3rd Grade	0	2	2	3	3
4th Grade	0	0	2	2	3
5th Grade	0	0	0	2	2
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	7	10	13	16	17
Change in Net # of Classes	7	3	3	3	1

**Other Key Assumptions
Enter Estimated Percentages**

LEAD Southeast Elementary
New Charter School Application Budget Template
Student Assumptions

SPED %	15%	15%	15%	15%	15%
SPED Count	20	29	38	47	50
ELL %	50%	50%	50%	50%	50%
ELL Count	65	95	125	155	168
Anticipated Paid %	n/a	n/a	n/a	n/a	n/a
Anticipated Reduced %	0%	0%	0%	0%	0%
Anticipated Free %	0%	0%	0%	0%	0%
Anticipated Paid Count	130	190	250	310	335
Anticipated Reduced Count	0	0	0	0	0
Anticipated Free Count	0	0	0	0	0
Total Free and Reduced Count	0	0	0	0	0
School Days	180	180	180	180	180
Attendance Rate	95%	95%	95%	95%	95%

LEAD Southeast Elementary
New Charter School Application Budget Template
Pre-Opening Budget

Revenue Assumptions

Year 0
2024-25

Federal Revenues

Rate/Assumption

Amount

Assumption Notes

CSP Startup Grant

\$0

\$0

Fundraising & Philanthropy

Detail any private funding sources

Other

\$350,000

Transfer from previously earned network unrestricted philanthropy

Other

\$0

Other

\$0

Other

\$0

Other

\$0

Total Revenues

350,000

Additional Space to Provide Fundraising Details

Compensation Assumptions

Year 0
2024-25

Administrative Staff

FTE Count

Assumption Notes

Principal/School Leader

0.75

\$84,150

Hiring September 2024: salary at 75%

Assistant Principal

0.00

\$0

Special Education Coordinator

0.00

\$0

Deans, Directors

0.00

\$0

Other (Specify in Assumptions)

0.00

\$0

Employer Benefits & Tax Assumptions			
		Year 0	
		2024-25	
	Base Assumption		Assumption Notes
Social Security	6.20%	\$11,495	
Medicare	1.45%	\$2,688	
State Unemployment	\$400 per employee	\$900	Hiring September 2024: rate @ 75%
Disability/Life Insurance	0.19%	\$352	
Workers Compensation Insurance	0.29%	\$538	
Other Fringe Benefits	0.02%	\$37	
Medical Insurance	\$4,410	\$9,923	Hiring September 2024: rate @ 75%

LEAD Southeast Elementary
New Charter School Application Budget Template
Pre-Opening Budget

Dental Insurance	\$331	\$745	Hiring September 2024: rate @ 75%
Vision Insurance	\$110	\$248	Hiring September 2024: rate @ 75%
Other Retirement	3.00%	\$5,562	
Total Employer Benefits & Taxes		\$32,487	

Operating Expenses

Year 0

2024-25

Contracted Services

Professional Development	\$0
Financial Services	\$0
Audit Services	\$0
Legal Fees	\$0
Copier Lease and Usage	\$0
Internet and Phone Service	\$0
Cell Phone Service	\$0
Payroll Services	\$0
Health Services	\$0
Transportation	\$0
IT Services	\$0
Contracted SPED Services	\$0
Insurance	\$0
Postal Charges	\$0
Bank Charges	\$0

Assumption Notes

\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	
\$0	

Supplies & Materials

Textbooks and Instructional Supplies	\$96
Education Software	\$22
Student Supplies	\$0
Faculty Supplies	\$0
Library Books	\$50
Testing & Evaluation	\$0
Student Laptops	\$400
Faculty Laptops	\$1,250
Office Supplies	\$0
Printing Paper	\$0

\$12,480	per student
\$2,860	per student
\$0	
\$0	
\$6,500	per student
\$0	
\$52,000	per student
\$23,750	Year 1 staff plus Year 0 staff
\$0	
\$0	

LEAD Southeast Elementary
New Charter School Application Budget Template
Pre-Opening Budget

Marketing Materials	\$12,875	\$12,875	per school - paid for at the network, represented here for transparency
Student Uniforms	\$0	\$0	
Gifts & Awards - Students	\$0	\$0	
Gifts & Awards - Teachers and Staff	\$0	\$0	
Health Supplies	\$0	\$0	

Facility Related Expenses

Rent	\$0	\$0	
Utilities	\$0	\$0	
Custodial	\$0	\$0	
Waste	\$0	\$0	
Faculty Furniture	\$0	\$0	
Student Furniture	\$0	\$0	
Internet/Network Equipment	\$0	\$0	
Other Equipment	\$0	\$0	
Building Decorum	\$0	\$0	
Tenant Improvements	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	

Other Charges

Staff Recruitment	\$0	\$5,000	
Student Recruitment & Community Engagement	\$0	\$5,000	
Parent & Staff Meetings	\$0	\$0	
Authorizer Fee	\$0	\$0	
Other	\$0	\$0	

Debt Service

Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	

Total Operating Expenses

\$120,465

Total Expenses

338,352

LEAD Southeast Elementary
New Charter School Application Budget Template
Pre-Opening Budget

LEAD Southeast Elementary
New Charter School Application Budget Template
Pre-Opening Cash Flow

look at the beginning cash option here

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
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
Beginning Cash	-	-	323,783	297,566	267,600	241,383	215,166	188,949	162,732	136,515	110,299	84,082	57,865	
Revenues														
State Revenues	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Federal Revenues	-	-	-	-	-	-	-	-	-	-	-	-	-	-
School Activity Revenues	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising & Philanthropy	350,000	\$350,000	-	-	-	-	-	-	-	-	-	-	350,000	-
Total Revenues	350,000	350,000	-	-	-	-	-	-	-	-	-	-	350,000	-
Expenses														
Staffing	185,400	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	185,400	-
Employer Benefits & Taxes	32,487	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	32,487	-
Contracted Services	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Supplies & Materials	110,465	7,226	7,226	10,976	7,226	7,226	7,226	7,226	7,226	7,226	7,226	7,226	90,465	20,000
Facility-Related Expenses	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Charges	10,000	833	833	833	833	833	833	833	833	833	833	833	10,000	-
Debt Service	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Total Expenses	338,352	26,217	26,217	29,967	26,217	26,217	26,217	26,217	26,217	26,217	26,217	26,217	318,352	20,000
Operating Income (Loss)	11,648	323,783	(26,217)	(29,967)	(26,217)	(26,217)	(26,217)	(26,217)	(26,217)	(26,217)	(26,217)	(26,217)	31,648	(20,000)
Changes in Accounts Receivable			-	-	-	-	-	-	-	-	-	-	-	-
Changes in Accounts Payable		-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Proceeds		-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Repayments		-	-	-	-	-	-	-	-	-	-	-	-	-
Other Balance Sheet Activity		-	-	-	-	-	-	-	-	-	-	-	-	-
Ending Cash	323,783	297,566	267,600	241,383	215,166	188,949	162,732	136,515	110,299	84,082	57,865	31,648		

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
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
Revenues														
Federal Revenues														
CSP Startup Grant	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising & Philanthropy														
Other	350,000	\$350,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	350,000	-
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-
Total Revenues	350,000	350,000	-	-	-	-	-	-	-	-	-	-	350,000	-

Assumption Notes

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
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
Compensation														
Principal/School Leader	84,150	\$7,013	\$7,013	\$7,013	\$7,013	\$7,013	\$7,013	\$7,013	\$7,013	\$7,013	\$7,013	\$7,013	84,150	-
Assistant Principal	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-

Assumption Notes

LEAD Southeast Elementary
New Charter School Application Budget Template
Pre-Opening Cash Flow

look at the beginning cash option here

Special Education Coordinator

Deans, Directors

Other (Specify in Assumptions)

Total Administrative Compensation

-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
84,150	\$7,013	7,013	7,013	7,013	7,013	7,013	7,013	7,013	7,013	7,013	7,013	7,013	84,150	-	

Instructional Staff

Teachers

Special Education Teachers

Educational Assistants/Aides

Elective Teachers

Other (Specify in Assumptions)

Total Instructional Compensation

-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
56,250	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	\$4,688	56,250	-	
56,250	4,688	4,688	4,688	4,688	4,688	4,688	4,688	4,688	4,688	4,688	4,688	4,688	56,250	-	

Non-Instructional Staff

Clerical Staff

Custodial Staff

Operations

Social Workers/Counseling

Other (Specify in Assumptions)

Total Non-Instructional Compensation

-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
45,000	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	45,000	-	
45,000	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	45,000	-	

Bonus

Other Non FTE Compensation

Other Non FTE Compensation

Other Non FTE Compensation

-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	

Total Compensation

185,400	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	15,450	185,400	-	

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	Year 0
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	2024-25
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP	

Assumption Notes

Social Security	11,495	\$958	\$958	\$958	\$958	\$958	\$958	\$958	\$958	\$958	\$958	\$958	\$958	11,495	-	
Medicare	2,688	\$224	\$224	\$224	\$224	\$224	\$224	\$224	\$224	\$224	\$224	\$224	\$224	2,688	-	
State Unemployment	900	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	\$75	900	-	
Disability/Life Insurance	352	\$29	\$29	\$29	\$29	\$29	\$29	\$29	\$29	\$29	\$29	\$29	\$29	352	-	
Workers Compensation Insurance	538	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	\$45	538	-	
Other Fringe Benefits	37	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	\$3	37	-	
Medical Insurance	9,923	\$827	\$827	\$827	\$827	\$827	\$827	\$827	\$827	\$827	\$827	\$827	\$827	9,923	-	
Dental Insurance	745	\$62	\$62	\$62	\$62	\$62	\$62	\$62	\$62	\$62	\$62	\$62	\$62	745	-	
Vision Insurance	248	\$21	\$21	\$21	\$21	\$21	\$21	\$21	\$21	\$21	\$21	\$21	\$21	248	-	
Other Retirement	5,562	\$464	\$464	\$464	\$464	\$464	\$464	\$464	\$464	\$464	\$464	\$464	\$464	5,562	-	

Total Employer Benefits & Taxes

32,487	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	2,707	32,487	-	

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	Year 0
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	2024-25
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP	

Contracted Services

Professional Development

Financial Services

Audit Services

Legal Fees

Copier Lease and Usage

Internet and Phone Service

Cell Phone Service

Payroll Services

Health Services

Transportation

IT Services

Contracted SPED Services

Insurance

Postal Charges

Bank Charges

Assumption Notes

-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Professional Development
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Financial Services
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Audit Services
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Legal Fees
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Copier Lease and Usage
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Internet and Phone Service
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Cell Phone Service
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Payroll Services
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Health Services
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Transportation
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	IT Services
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Contracted SPED Services
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Insurance
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Postal Charges
-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Bank Charges

LEAD Southeast Elementary
New Charter School Application Budget Template
Pre-Opening Cash Flow

look at the beginning cash option here

Supplies & Materials																
Textbooks and Instructional Supplies	12,480	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	\$1,040	12,480	-	Textbooks and Instructional Supplies
Education Software	2,860	\$238	\$238	\$238	\$238	\$238	\$238	\$238	\$238	\$238	\$238	\$238	\$238	2,860	-	Education Software
Student Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Student Supplies
Faculty Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Faculty Supplies
Library Books	6,500	\$542	\$542	\$542	\$542	\$542	\$542	\$542	\$542	\$542	\$542	\$542	\$542	6,500	-	Library Books
Testing & Evaluation	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Testing & Evaluation
Student Laptops	52,000	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	\$4,333	52,000	-	Student Laptops
Faculty Laptops	23,750	\$0	\$0	\$3,750	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	3,750	20,000	Faculty Laptops
Office Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Office Supplies
Printing Paper	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Printing Paper
Marketing Materials	12,875	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	12,875	-	Marketing Materials
Student Uniforms	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Student Uniforms
Gifts & Awards - Students	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Gifts & Awards - Students
Gifts & Awards - Teachers and Staff	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Gifts & Awards - Teachers and Staff
Health Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Health Supplies

Facility Related Expenses																
Rent	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Rent
Utilities	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Utilities
Custodial	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Custodial
Waste	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Waste
Faculty Furniture	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Faculty Furniture
Student Furniture	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Student Furniture
Internet/Network Equipment	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Internet/Network Equipment
Other Equipment	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other Equipment
Building Decorum	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Building Decorum
Tenant Improvements	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Tenant Improvements
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other

Other Charges																
Staff Recruitment	5,000	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	5,000	-	Staff Recruitment
Student Recruitment & Community Engagement	5,000	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	\$417	5,000	-	Student Recruitment & Community Engagement
Parent & Staff Meetings	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Parent Meetings
Authorizer Fee	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Staff Meetings
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other

Debt Service																
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Total Operating Expenses	120,465	\$8,060	8,060	11,810	8,060	8,060	8,060	8,060	8,060	8,060	8,060	8,060	8,060	100,465	20,000

Total Expenses	338,352	26,217	26,217	29,967	26,217	26,217	26,217	26,217	26,217	26,217	26,217	26,217	26,217	318,352	20,000

LEAD Southeast Elementary
New Charter School Application Budget Template
Year 1-5 Staff Assumptions

FTE Assumptions

Fiscal Year	Year 1	Year 2	Year 3	Year 4	Year 5
Enrollment	2025-26	2026-27	2027-28	2028-29	2029-30
# of Classes	130	190	250	310	335
	7	10	13	16	17

Administrative Staff

Principal/School Leader	1.00	1.00	1.00	1.00	1.00
Assistant Principal	1.00	1.00	2.00	2.00	2.00
Special Education Coordinator	0.00	0.00	1.00	1.00	1.00
Deans, Directors	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 Administrative FTE	2.00	2.00	4.00	4.00	4.00

Instructional Staff

Teachers	7.00	10.00	13.00	16.00	17.00
Special Education Teachers	1.00	2.00	3.00	4.00	4.00
Educational Assistants/Aides	0.00	0.00	1.00	1.00	2.00
Elective Teachers	3.00	3.00	4.00	5.00	5.00
Other (Specify in Assumptions)	0.00	2.00	4.00	5.00	7.00
Total Instructional FTE	11.00	17.00	25.00	31.00	35.00

Non-Instructional Staff

Clerical Staff	1.00	1.00	2.00	2.00	2.00
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	1.00	1.00	1.00	1.00
Other (Specify in Assumptions)	1.00	1.00	2.00	2.00	2.00
Total Non-Instructional FTE	3.00	4.00	6.00	6.00	6.00

Total FTE	16.00	23.00	35.00	41.00	45.00

Exceptional Education Compliance
Special Education Teacher
Related Arts Teachers and Media Specialist - see narrative for breakdown
Interventionist, Instructional Managers, and LT Subs- see narrative for breakdown
Office Manager, Receptionist- see narrative for breakdown
Family Engagement and Student Support Coordinators- see narrative for breakdown

Compensation Assumptions

	Year 1	Year 2	Year 3	Year 4	Year 5
	2025-26	2026-27	2027-28	2028-29	2029-30
Annual Increase	0.00%	4.50%	4.50%	4.50%	4.50%
Cumulative Increase	100.00%	104.50%	109.20%	114.12%	119.25%

Administrative Staff

Principal/School Leader	Base Assumption	112,200	117,249	122,525	128,039	133,801
Assistant Principal	\$84,700	84,700	88,512	184,989	193,314	202,013
Special Education Coordinator	\$65,000	-	-	70,982	74,176	77,514
Deans, Directors		-	-	-	-	-
Other (Specify in Assumptions)		-	-	-	-	-
Total Administrative Compensation		196,900	205,761	378,496	395,528	413,327

Assumption Notes

All staffing is based on expected staffing model with average salaries, plus annual wage increases

Instructional Staff

Teachers	\$61,300	429,100	640,585	870,235	1,119,256	1,242,724
Special Education Teachers	\$53,500	53,500	111,815	175,270	244,210	255,199
Educational Assistants/Aides	\$37,500	-	-	40,951	42,794	89,439
Elective Teachers	\$37,500	112,500	117,563	163,804	213,969	223,597
Other (Specify in Assumptions)	\$62,000	-	129,580	270,822	353,761	517,553
Total Instructional Compensation		595,100	999,543	1,521,082	1,973,989	2,328,512

-
Special Education Teacher (Sped, EL, 504)
-
Related Arts Teachers and Media Specialist - see narrative for breakdown
Interventionist, Instructional Managers, and LT Subs- see narrative for breakdown
-

Non-Instructional Staff

Clerical Staff	\$45,000	45,000	47,025	98,282	102,705	107,327
Custodial Staff	\$0	-	-	-	-	-
Operations	\$69,000	69,000	72,105	75,350	78,740	82,284

Office Manager, Receptionist- see narrative for breakdown
-
-

LEAD Southeast Elementary New Charter School Application Budget Template Year 1-5 Staff Assumptions						
Social Workers/Counseling Other (Specify in Assumptions) Total Non-Instructional Compensation	\$55,500	-	57,998	60,607	63,335	66,185
	\$46,300	46,300	48,384	101,122	105,672	110,427
		160,300	225,511	335,361	350,452	366,222
Bonus		12,000	12,000	12,000	12,000	12,000
Other Compensation		-	-	-	-	-
Other Compensation		-	-	-	-	-
Other Compensation		-	-	-	-	-
Total Compensation		964,300	1,442,814	2,246,938	2,731,969	3,120,061
Employer Benefits & Tax Assumptions						
Social Security Medicare State Unemployment Disability/Life Insurance Workers Compensation Insurance Other Fringe Benefits	Base Assumption	Year 1 2025-26	Year 2 2026-27	Year 3 2027-28	Year 4 2028-29	Year 5 2029-30
	6.20%	\$59,787	\$89,454	\$139,310	\$169,382	\$193,444
	1.45%	\$13,982	\$20,921	\$32,581	\$39,614	\$45,241
	\$400 per employee	\$6,400	\$9,200	\$14,000	\$16,400	\$18,000
	0.19%	\$1,832	\$2,741	\$4,269	\$5,191	\$5,928
	0.29%	\$2,796	\$4,184	\$6,516	\$7,923	\$9,048
	0.02%	\$193	\$289	\$449	\$546	\$624
Assumption Notes						
Life and AD&D						
Adjusted for staffing and based on current contribution rates						
Long Term Disability						

LEAD Southeast Elementary
New Charter School Application Budget Template
Year 1 Budget

Revenue Assumptions

	Year 1
	2025-26
Annual Revenue Increase	3.00%
Cumulative Increase	103.00%

State Revenues	Rate/Assumption		Assumption Notes
TISA Base Rate	\$15,811	\$2,117,093	used number provided to us
TISA Weights	See Tracker	\$0	
TISA Direct	See Tracker	\$0	
Other			
Other			
Federal Revenues		\$0	
Title I	\$330	\$44,187	
Title II	\$22	\$2,946	
Title III	\$0	\$0	
NSLP	\$0	\$0	
E-Rate	\$0	\$0	
CSP Startup Grant	\$0	\$200,000	see budget narrative
Other	\$1,737	\$34,740	IDEA; per student
Other	\$0	\$0	
School Activity Revenues			
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Fundraising & Philanthropy			
Other	\$0	\$200,000	New Elementary Startup Campaign
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Total Revenues		\$2,598,966	

Compensation

Year 1
2025-26

LEAD Southeast Elementary
New Charter School Application Budget Template
Year 1 Budget

Administrative Staff		FTE Count	Assumption Notes	
Principal/School Leader	1.00	112,200		
Assistant Principal	1.00	84,700		
Special Education Coordinator	0.00	-		
Deans, Directors	0.00	-		
Other (Specify in Assumptions)	0.00	-		
Total Administrative Compensation		2.00	196,900	
Instructional Staff				
Teachers	7.00	429,100		
Special Education Teachers	1.00	53,500		
Educational Assistants/Aides	0.00	-		
Elective Teachers	3.00	112,500		
Other (Specify in Assumptions)	0.00	-		
Total Instructional Compensation		11.00	595,100	
Non-Instructional Staff				
Clerical Staff	1.00	45,000		
Custodial Staff	0.00	-		
Operations	1.00	69,000		
Social Workers/Counseling	0.00	-		
Other (Specify in Assumptions)	1.00	46,300		
Total Non-Instructional Compensation		3.00	160,300	
Other Compensation		12,000		
Other Compensation		-		
Other Compensation		-		
Other Compensation		-		
Total Compensation			964,300	

Employer Benefits & Taxes

Year 1
2025-26

		Assumption Notes
Social Security	59,787	
Medicare	13,982	
State Unemployment	6,400	
Disability/Life Insurance	1,832	3
Workers Compensation Insurance	2,796	
Other Fringe Benefits	193	
Medical Insurance	70,560	
Dental Insurance	5,296	
Vision Insurance	1,760	

LEAD Southeast Elementary
New Charter School Application Budget Template

Year 1 Budget

TCRS Certified Legacy	96,430	
TCRS Certified Hybrid	48,215	
TCRS Classified Legacy	-	
TCRS Classified Hybrid	-	
Other Classified Retirement	28,929	
Other Retirement	-	

Total Employer Benefits & Taxes	336,180

Operating Expenses

Year 1

2025-26

Contracted Services

			Assumption Notes
Professional Development	\$1,200	\$19,200	based on per FTE
Financial Services	\$6,438	\$6,438	per school - paid for at the network, represented here for transparency
Audit Services	\$9,013	\$9,013	per school - paid for at the network, represented here for transparency
Legal Fees	\$6,438	\$6,438	per school - paid for at the network, represented here for transparency
Copier Lease and Usage	\$58	\$7,540	per student; copier lease, maintenance and usage
Internet and Phone Service	\$5,600	\$5,600	per year
Cell Phone Service	\$0	\$0	we do not provide cell phones
Payroll Services	\$283	\$4,527	per FTE - paid for at the network, represented here for transparency
Health Services	\$0	\$25,000	part-time nurse
Transportation	\$65,000	\$65,000	based on 1 bus
IT Services	\$20,000	\$20,000	per year
Contracted SPED Services	\$175	\$22,750	per student
Insurance	\$12,507	\$12,507	per school - paid for at the network, represented here for transparency
Postal Charges	\$0	\$0	n/a
Bank Charges	\$0	\$0	network Expenditure

Supplies & Materials

Textbooks and Instructional Supplies	\$96	\$0	accounted for in pre-opening budget
Education Software	\$22	\$0	accounted for in pre-opening budget
Student Supplies	\$25	\$3,250	per student
Faculty Supplies	\$10	\$160	per FTE
Library Books	\$50	\$0	accounted for in pre-opening budget
Testing & Evaluation	\$19	\$2,470	per student
Student Laptops	\$250	\$0	accounted for in pre-opening budget
Faculty Laptops	\$1,250	\$0	accounted for in pre-opening budget
Office Supplies	\$72	\$9,360	per student
Printing Paper	\$20,000	\$20,000	per year
Marketing Materials	\$12,875	\$12,875	per school - paid for at the network, represented here for transparency
Student Uniforms	\$0	\$0	we do not provide student uniforms
Gifts & Awards - Students	\$35	\$4,550	per student
Gifts & Awards - Teachers and Staff	\$75	\$1,200	per FTE
Health Supplies	\$0	\$0	included in health services

LEAD Southeast Elementary
New Charter School Application Budget Template
Year 1 Budget

Facility Related Expenses

Rent	\$0	\$0	see facilities debt sevice
Utilities	\$90,000	\$90,000	per year
Custodial	\$130,000	\$130,000	per year; custodial services and supplies
Waste	\$0	\$0	included in custodial
Faculty Furniture	\$0	\$0	included in Debt Service assumptions
Student Furniture	\$0	\$0	included in Debt Service assumptions
Internet/Network Equipment	\$0	\$0	included in Debt Service assumptions
Other Equipment	\$0	\$0	included in building maintenance "other" line 165
Building Decorum	\$0	\$0	included in building maintenance "other" line 165
Tenant Improvements	\$0	\$0	included in building maintenance "other" line 165
Other	\$10,000	\$10,000	per year; building maintenance
Other	\$10,000	\$10,000	loss of aftercare
Other	\$10,000	\$10,000	summer school
Other	\$0	\$0	
Other	\$0	\$0	

Other Charges

Staff Recruitment	\$3,000	\$3,000	per school - paid for at the network, represented here for transparency
Student Recruitment & Community Engagement	\$2,900	\$2,900	per year
Parent & Staff Meetings	\$0	\$0	included in student recruitment
Authorizer Fee	\$35,000	\$35,000	
Other	\$0	\$0	-

Debt Service

Other	\$714,000	\$714,000	see narrative for assumptions- based on 30 year fixed loan - no yoy changes
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	
Other	\$0	\$0	

Total Operating Expenses

\$1,262,777

Total Expenses

2,563,258

LEAD Southeast Elementary
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	Year 1
2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP

Beginning Cash	31,648	31,648	34,624	37,600	40,575	43,551	46,527	49,502	52,478	55,454	58,429	61,405	64,381		
Revenues															
State Revenues	2,117,093	\$176,424	176,424	176,424	176,424	176,424	176,424	176,424	176,424	176,424	176,424	176,424	176,424	2,117,093	-
Federal Revenues	281,873	23,489	23,489	23,489	23,489	23,489	23,489	23,489	23,489	23,489	23,489	23,489	23,489	281,873	-
School Activity Revenues	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising & Philanthropy	200,000	16,667	16,667	16,667	16,667	16,667	16,667	16,667	16,667	16,667	16,667	16,667	16,667	200,000	-
Total Revenues	2,598,966	\$216,580	216,580	216,580	216,580	216,580	216,580	216,580	216,580	216,580	216,580	216,580	216,580	2,598,966	-
Expenses															
Staffing	964,300	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	964,300	-
Employer Benefits & Taxes	336,180	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	336,180	-
Contracted Services	204,012	17,001	17,001	17,001	17,001	17,001	17,001	17,001	17,001	17,001	17,001	17,001	17,001	204,012	-
Supplies & Materials	53,865	4,489	4,489	4,489	4,489	4,489	4,489	4,489	4,489	4,489	4,489	4,489	4,489	53,865	-
Facility-Related Expenses	250,000	20,833	20,833	20,833	20,833	20,833	20,833	20,833	20,833	20,833	20,833	20,833	20,833	250,000	-
Other Charges	40,900	3,408	3,408	3,408	3,408	3,408	3,408	3,408	3,408	3,408	3,408	3,408	3,408	40,900	-
Debt Service	714,000	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	714,000	-
Total Expenses	2,563,258	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	2,563,258	-
Operating Income (Loss)	35,708	\$2,976	2,976	2,976	2,976	2,976	2,976	2,976	2,976	2,976	2,976	2,976	2,976	35,708	-
Changes in Accounts Receivable	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Changes in Accounts Payable	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Proceeds	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Line of Credit Repayments	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other Balance Sheet Activity	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ending Cash	34,624	37,600	40,575	43,551	46,527	49,502	52,478	55,454	58,429	61,405	64,381	67,356			

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
2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP

Revenues																Assumption Notes
State Revenues																Assumption Notes
TISA Base Rate	2,117,093	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	\$176,424	2,117,093	-	
TISA Weights	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
TISA Direct	-	\$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	-	-	
Federal Revenues																
Title I	44,187	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	\$3,682	44,187	-	
Title II	2,946	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	\$245	2,946	-	
Title III	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
NSLP	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
E-Rate	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
CSP Startup Grant	200,000	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	200,000	-	
Other	34,740	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	\$2,895	34,740	-	
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
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	-	-	

LEAD Southeast Elementary
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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

Other	200,000	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	\$16,667	200,000	-	
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	-	-	

Total Revenues	2,598,966	\$216,580	216,580	216,580	216,580	\$216,580	216,580	216,580	216,580	216,580	216,580	216,580	216,580	2,598,966	-	

Compensation

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	Year 1
2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP	

Compensation

Principal/School Leader	112,200	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	\$9,350	112,200	-	Assumption Notes
Assistant Principal	84,700	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	\$7,058	84,700	-	
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	196,900	16,408	16,408	16,408	16,408	16,408	16,408	16,408	16,408	16,408	16,408	16,408	16,408	196,900	-	

Instructional Staff

Teachers	429,100	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	\$35,758	429,100	-	
Special Education Teachers	53,500	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	\$4,458	53,500	-	
Educational Assistants/Aides	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Elective Teachers	112,500	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	112,500	-	
Other (Specify in Assumptions)	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Total Instructional Compensation	595,100	49,592	49,592	49,592	49,592	49,592	49,592	49,592	49,592	49,592	49,592	49,592	49,592	595,100	-	

Non-Instructional Staff

Clerical Staff	45,000	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	\$3,750	45,000	-	
Custodial Staff	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Operations	69,000	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	\$5,750	69,000	-	
Social Workers/Counseling	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other (Specify in Assumptions)	46,300	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	\$3,858	46,300	-	
Total Non-Instructional Compensation	160,300	13,358	13,358	13,358	13,358	13,358	13,358	13,358	13,358	13,358	13,358	13,358	13,358	160,300	-	

Other Compensation	12,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	12,000	-	
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	-	-	
Total Compensation	964,300	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	80,358	964,300	-	

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	Year 1
2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP	

Assumption Notes

Social Security	59,787	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	\$4,982	59,787	-	
Medicare	13,982	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	\$1,165	13,982	-	
State Unemployment	6,400	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	\$533	6,400	-	
Disability/Life Insurance	1,832	\$153	\$153	\$153	\$153	\$153	\$153	\$153	\$153	\$153	\$153	\$153	\$153	1,832	-	
Workers Compensation Insurance	2,796	\$233	\$233	\$233	\$233	\$233	\$233	\$233	\$233	\$233	\$233	\$233	\$233	2,796	-	
Other Fringe Benefits	193	\$16	\$16	\$16	\$16	\$16	\$16	\$16	\$16	\$16	\$16	\$16	\$16	193	-	
Medical Insurance	70,560	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	\$5,880	70,560	-	
Dental Insurance	5,296	\$441	\$441	\$441	\$441	\$441	\$441	\$441	\$441	\$441	\$441	\$441	\$441	5,296	-	
Vision Insurance	1,760	\$147	\$147	\$147	\$147	\$147	\$147	\$147	\$147	\$147	\$147	\$147	\$147	1,760	-	

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TCRS Certified Legacy	96,430	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	\$8,036	96,430	-	
TCRS Certified Hybrid	48,215	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	\$4,018	48,215	-	
TCRS Classified Legacy	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
TCRS Classified Hybrid	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	
Other Classified Retirement	28,929	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	\$2,411	28,929	-	
Other Retirement	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	

Total Employer Benefits & Taxes	336,180	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	28,015	336,180	-	

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
2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26	2025-26
Total Budget	July	August	September	October	November	December	January	February	March	April	May	June	Total	AR/AP

Contracted Services																Assumption Notes
Professional Development	19,200	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	\$1,600	19,200	-	Professional Development
Financial Services	6,438	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	6,438	-	Financial Services
Audit Services	9,013	\$751	\$751	\$751	\$751	\$751	\$751	\$751	\$751	\$751	\$751	\$751	\$751	9,013	-	Audit Services
Legal Fees	6,438	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	\$536	6,438	-	Legal Fees
Copier Lease and Usage	7,540	\$628	\$628	\$628	\$628	\$628	\$628	\$628	\$628	\$628	\$628	\$628	\$628	7,540	-	Copier Lease and Usage
Internet and Phone Service	5,600	\$467	\$467	\$467	\$467	\$467	\$467	\$467	\$467	\$467	\$467	\$467	\$467	5,600	-	Internet and Phone Service
Cell Phone Service	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Cell Phone Service
Payroll Services	4,527	\$377	\$377	\$377	\$377	\$377	\$377	\$377	\$377	\$377	\$377	\$377	\$377	4,527	-	Payroll Services
Health Services	25,000	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	\$2,083	25,000	-	Health Services
Transportation	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	-	Transportation
IT Services	20,000	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	20,000	-	IT Services
Contracted SPED Services	22,750	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	\$1,896	22,750	-	Contracted SPED Services
Insurance	12,507	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	\$1,042	12,507	-	Insurance
Postal Charges	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Postal Charges
Bank Charges	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Bank Charges

Supplies & Materials																
Textbooks and Instructional Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Textbooks and Instructional Supplies
Education Software	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Education Software
Student Supplies	3,250	\$271	\$271	\$271	\$271	\$271	\$271	\$271	\$271	\$271	\$271	\$271	\$271	3,250	-	Student Supplies
Faculty Supplies	160	\$13	\$13	\$13	\$13	\$13	\$13	\$13	\$13	\$13	\$13	\$13	\$13	160	-	Faculty Supplies
Library Books	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Library Books
Testing & Evaluation	2,470	\$206	\$206	\$206	\$206	\$206	\$206	\$206	\$206	\$206	\$206	\$206	\$206	2,470	-	Testing & Evaluation
Student Laptops	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Student Laptops
Faculty Laptops	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Faculty Laptops
Office Supplies	9,360	\$780	\$780	\$780	\$780	\$780	\$780	\$780	\$780	\$780	\$780	\$780	\$780	9,360	-	Office Supplies
Printing Paper	20,000	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	\$1,667	20,000	-	Printing Paper
Marketing Materials	12,875	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	\$1,073	12,875	-	Marketing Materials
Student Uniforms	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Student Uniforms
Gifts & Awards - Students	4,550	\$379	\$379	\$379	\$379	\$379	\$379	\$379	\$379	\$379	\$379	\$379	\$379	4,550	-	Gifts & Awards - Students
Gifts & Awards - Teachers and Staff	1,200	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	1,200	-	Gifts & Awards - Teachers and Staff
Health Supplies	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Health Supplies

Facility Related Expenses																
Rent	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Rent
Utilities	90,000	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500	90,000	-	Utilities
Custodial	130,000	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	\$10,833	130,000	-	Custodial
Waste	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Waste
Faculty Furniture	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Faculty Furniture
Student Furniture	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Student Furniture
Internet/Network Equipment	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Internet/Network Equipment
Other Equipment	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other Equipment
Building Decorum	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Building Decorum
Tenant Improvements	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Tenant Improvements
Other	10,000	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	10,000	-	Other
Other	10,000	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	10,000	-	Other
Other	10,000	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	\$833	10,000	-	Other
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other

Other Charges

LEAD Southeast Elementary
New Charter School Application Budget Template
Year 1 Cash Flow

Staff Recruitment	3,000	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	\$250	3,000	-	Staff Recruitment
Student Recruitment & Community En	2,900	\$242	\$242	\$242	\$242	\$242	\$242	\$242	\$242	\$242	\$242	\$242	\$242	2,900	-	Student Recruitment & Community Engagement
Parent & Staff Meetings	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Parent Meetings
Authorizer Fee	35,000	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	35,000	-	Staff Meetings
Other	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	-	-	Other
Debt Service																
Other	714,000	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	59,500	714,000	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Total Operating Expenses																
	1,262,777	105,231	105,231	105,231	105,231	105,231	105,231	105,231	105,231	105,231	105,231	105,231	105,231	1,262,777	-	
Total Expenses																
	2,563,258	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	213,605	2,563,258	-	

LEAD Southeast Elementary New Charter School Application Budget Template Year 2 Through 5 Budget							
Revenue Assumptions							
Annual Revenue Increase	Year 1	Year 2	Year 3	Year 4	Year 5		
	2025-26	2026-27	2027-28	2028-29	2029-30		
	3.00%	3.00%	3.00%	3.00%	3.00%		
Cumulative Increase	103.00%	106.09%	109.27%	112.55%	115.93%		
State Revenues	Assumption	Assumption Notes					
TISA Base Rate	\$15,811	2,117,093	\$3,094,213	\$4,193,472	\$5,355,903	\$5,961,466	
TISA Weights	See Tracker	-	\$0	\$0	\$0	\$0	
TISA Direct	See Tracker	-	\$0	\$0	\$0	\$0	
Other		-	\$0	\$0	\$0	\$0	
Other		-	\$0	\$0	\$0	\$0	
Federal Revenues							
Title I	\$330	44,187	\$66,518	\$90,150	\$115,140	\$128,158	
Title II	\$22	2,946	\$4,435	\$6,010	\$7,676	\$8,544	-
Title III	\$0	-	\$0	\$0	\$0	\$0	-
NSLP	\$0	-	\$0	\$0	\$0	\$0	-
E-Rate	\$0	-	\$0	\$0	\$0	\$0	-
CSP Startup Grant	\$0	200,000	\$200,000	\$0	\$0	\$0	-
Other	\$1,737	34,740	\$50,373	\$66,006	\$81,639	\$86,850	IDEA
Other	\$0	-	\$0	\$0	\$0	\$0	
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							
Other	\$0	200,000	\$200,000	\$0	\$0	\$0	Transfer from previously earned network unrestricted philanthropy
Other	\$0	-	\$0	\$250,000	\$0	\$0	Elementary School Start Up Campaign
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	\$0	
Total Revenues		2,598,966	3,615,539	4,605,638	5,560,358	6,185,017	
Compensation							

LEAD Southeast Elementary
New Charter School Application Budget Template
Year 2 Through 5 Budget

Year 1	Year 2	Year 3	Year 4	Year 5
2025-26	2026-27	2027-28	2028-29	2029-30

Administrative Staff

Principal/School Leader

Assistant Principal

Special Education

Coordinator

Deans, Directors

Other (Specify in

Assumptions)

Total Administrative**Compensation**

					Assumption Notes
112,200	117,249	122,525	128,039	133,801	-
84,700	88,512	184,989	193,314	202,013	-
-	-	70,982	74,176	77,514	Exceptional Education Compliance
-	-	-	-	-	-
-	-	-	-	-	-
196,900	205,761	378,496	395,528	413,327	

Instructional Staff

Teachers

Special Education Teachers

Educational

Assistants/Aides

Elective Teachers

Other (Specify in

Assumptions)

Total Instructional**Compensation**

429,100	640,585	870,235	1,119,256	1,242,724	-
53,500	111,815	175,270	244,210	255,199	Special Education Teacher
-	-	40,951	42,794	89,439	-
112,500	117,563	163,804	213,969	223,597	Related Arts Teachers and Media Specialist - see narrative for breakdown
-	129,580	270,822	353,761	517,553	Interventionist, Instructional Managers, and LT Subs- see narrative for breakdown
595,100	999,543	1,521,082	1,973,989	2,328,512	

Non-Instructional Staff

Clerical Staff

Custodial Staff

Operations

Social Workers/Counseling

Other (Specify in

Assumptions)

Total Non-Instructional**Compensation**

45,000	47,025	98,282	102,705	107,327	Office Manager, Receptionist- see narrative for breakdown
-	-	-	-	-	-
69,000	72,105	75,350	78,740	82,284	-
-	57,998	60,607	63,335	66,185	-
46,300	48,384	101,122	105,672	110,427	Family Engagement and Student Support Coordinators- see narrative for breakdown
160,300	225,511	335,361	350,452	366,222	

Other Compensation

Other Compensation

Other Compensation

Other Compensation

12,000	12,000	12,000	12,000	12,000	Performance Bonus
-	-	-	-	-	-
-	-	-	-	-	-
-	-	-	-	-	-

Total Compensation

964,300	1,442,814	2,246,938	2,731,969	3,120,061

Employer Benefits & Taxes

LEAD Southeast Elementary
New Charter School Application Budget Template
Year 2 Through 5 Budget

Year 1	Year 2	Year 3	Year 4	Year 5
2025-26	2026-27	2027-28	2028-29	2029-30

						Assumption Notes
Social Security	59,787	89,454	139,310	169,382	193,444	-
Medicare	13,982	20,921	32,581	39,614	45,241	-
State Unemployment	6,400	9,200	14,000	16,400	18,000	-
Disability/Life Insurance	1,832	2,741	4,269	5,191	5,928	Life and AD&D
Workers Compensation Insurance	2,796	4,184	6,516	7,923	9,048	Adjusted for staffing and based on current contribution rates
Other Fringe Benefits	193	289	449	546	624	Long Term Disability
Medical Insurance	70,560	106,502	170,171	209,310	241,217	Adjusted for staffing and based on current contribution rates
Dental Insurance	5,296	7,994	12,772	15,710	18,105	Adjusted for staffing and based on current contribution rates
Vision Insurance	1,760	2,657	4,245	5,221	6,017	Adjusted for staffing and based on current contribution rates
TCRS Certified Legacy	96,430	144,281	224,694	273,197	312,006	-
TCRS Certified Hybrid	48,215	72,141	112,347	136,598	156,003	
TCRS Classified Legacy	-	-	-	-	-	
TCRS Classified Hybrid	-	-	-	-	-	
Other Classified Retirement	28,929	43,284	67,408	81,959	93,602	
Other Retirement	-	-	-	-	-	
Total Employer Benefits & Taxes	336,180	503,648	788,762	961,051	1,099,235	

Operating Expenses

		Year 1	Year 2	Year 3	Year 4	Year 5	Assumption Notes
		2025-26	2026-27	2027-28	2028-29	2029-30	
Annual Expense Increase		0.00%	2.00%	2.00%	2.00%	2.00%	
Cumulative Increase		100.00%	102.00%	104.04%	106.12%	108.24%	
Transportation Cumulative		100.00%	104.00%	108.16%	112.49%	116.99%	
Contracted Services							
Professional Development	\$1,200	19,200	\$28,152	\$43,697	\$52,211	\$58,451	based on per FTE
Financial Services	\$6,438	6,438	\$6,566	\$6,698	\$6,832	\$6,968	included in Audit Services
Audit Services	\$9,013	9,013	\$9,193	\$9,377	\$9,564	\$9,755	per school - paid for at the network, represented here for transparency
Legal Fees	\$6,438	6,438	\$6,566	\$6,698	\$6,832	\$6,968	per school - paid for at the network, represented here for transparency
Copier Lease and Usage	\$58	7,540	\$11,240	\$15,086	\$19,081	\$21,032	per student; copier lease, maintenance and usage
Internet and Phone Service	\$5,600	5,600	\$5,712	\$5,826	\$5,943	\$6,062	per year
Cell Phone Service	\$0	-	\$0	\$0	\$0	\$0	we do not provide cell phones
Payroll Services	\$283	4,527	\$6,638	\$10,304	\$12,312	\$13,783	per school - paid for at the network, represented here for transparency
Health Services	\$0	25,000	\$25,500	\$26,010	\$53,060	\$54,122	Years 1-3 part time nurse, Years 4-5 full time nurse
Transportation	\$65,000	65,000	\$135,200	\$140,608	\$219,348	\$228,122	
IT Services	\$20,000	20,000	\$20,400	\$20,808	\$21,224	\$21,649	per year
Contracted SPED Services	\$175	22,750	\$33,915	\$45,518	\$57,571	\$63,458	per student
Insurance	\$12,507	12,507	\$12,757	\$13,012	\$13,273	\$13,538	per school - paid for at the network, represented here for transparency
Postal Charges	\$0	-	\$0	\$0	\$0	\$0	n/a

LEAD Southeast Elementary New Charter School Application Budget Template Year 2 Through 5 Budget						
Bank Charges	\$0	-	\$0	\$0	\$0	network Expenditure
Supplies & Materials						
Textbooks and Instructional S	\$96	-	\$18,605	\$24,970	\$31,582	\$34,811 per student
Education Software	\$22	-	\$4,264	\$5,722	\$7,237	\$7,978 per student
Student Supplies	\$25	3,250	\$4,845	\$6,503	\$8,224	\$9,065 per student
Faculty Supplies	\$10	160	\$235	\$364	\$435	\$487 per FTE
Library Books	\$50	-	\$9,690	\$13,005	\$16,449	\$18,131 per student
Testing & Evaluation	\$19	2,470	\$3,682	\$4,942	\$6,251	\$6,890 per student
Student Laptops	\$400	-	\$24,000	\$66,000	\$14,000	\$34,000 per student
Faculty Laptops	\$1,250	-	\$8,750	\$15,000	\$27,500	\$13,750 per fte
Office Supplies	\$72	9,360	\$13,954	\$18,727	\$23,686	\$26,108 per student
Printing Paper	\$20,000	20,000	\$20,400	\$20,808	\$21,224	\$21,649 per year
Marketing Materials	\$12,875	12,875	\$13,133	\$13,395	\$13,663	\$13,936 per school - paid for at the network, represented here for transparency
Student Uniforms	\$0	-	\$0	\$0	\$0	we do not provide student uniforms
Gifts & Awards - Students	\$35	4,550	\$6,783	\$9,104	\$11,514	\$12,692 per student
Gifts & Awards - Teachers and	\$75	1,200	\$1,760	\$2,731	\$3,263	\$3,653 per FTE
Health Supplies	\$0	-	\$0	\$0	\$0	included in health services
Facility Related Expenses						
Rent	\$0	-	\$0	\$0	\$0	see facilities debt services
Utilities	\$90,000	90,000	\$91,800	\$93,636	\$95,509	\$97,419 per year
Custodial	\$130,000	130,000	\$132,600	\$135,252	\$137,957	\$140,716 per year; custodial services and supplies
Waste	\$0	-	\$0	\$0	\$0	included in custodial
Faculty Furniture	\$0	-	\$0	\$0	\$0	included in Debt Service assumptions- print the out for application
Student Furniture	\$0	-	\$0	\$0	\$0	included in Debt Service assumptions
Internet/Network Equipment	\$0	-	\$0	\$0	\$0	included in Debt Service assumptions
Other Equipment	\$0	-	\$0	\$0	\$0	included in building maintenance "other" line 165
Building Decorum	\$0	-	\$0	\$0	\$0	included in building maintenance "other" line 165
Tenant Improvements	\$0	-	\$0	\$0	\$0	included in building maintenance "other" line 165
Other	\$10,000	10,000	\$10,200	\$10,404	\$15,000	\$15,300 per year; building maintenance
Other	\$10,000	10,000	\$10,000	\$10,000	\$20,000	\$20,400 aftercare loss
Other	\$10,000	10,000	\$15,000	\$20,000	\$25,000	\$30,000 summer school
Other	\$0	-	\$0	\$0	\$0	
Other	\$0	-	\$0	\$0	\$0	
Other Charges						
Staff Recruitment	\$3,000	3,000	3,060	3,060	3,060	3,060 per school - paid for at the network, represented here for transparency
Student Recruitment & Comm	\$2,900	2,900	\$2,958	\$3,017	\$3,078	\$3,139 per year
Parent & Staff Meetings	\$0	-	-	-	-	- included in student recruitment
Authorizer Fee	\$35,000	35,000	35,000	35,000	35,000	-
Other	\$0	-	\$0	\$0	\$0	
Debt Service						
Other	\$714,000	\$714,000	\$714,000	\$714,000	\$714,000	see narrative for assumptions- based on 30 year fixed loan - no yoy changes
Other	\$0	-	-	-	-	-
Other	\$0	-	-	-	-	-

LEAD Southeast Elementary						
New Charter School Application Budget Template						
Year 2 Through 5 Budget						
Other	\$0	-	-	-	-	-
Other	\$0	-	-	-	-	-
Total Operating Expenses		1,262,777	1,446,557	1,569,280	1,710,882	\$1,766,091
Total Expenses		2,563,258	3,393,019	4,604,981	5,403,902	5,985,388

LEAD Southeast Elementary
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
	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Starting Fund Balance	-	11,648	47,356	269,876	270,534	426,990
State Revenues	-	2,117,093	3,094,213	4,193,472	5,355,903	5,961,466
Federal Revenues	-	281,873	321,326	162,166	204,455	223,552
School Activity Revenues	-	-	-	-	-	-
Fundraising & Philanthropy	350,000	200,000	200,000	250,000	-	-
Total Revenues	350,000	2,598,966	3,615,539	4,605,638	5,560,358	6,185,017
Staffing	185,400	964,300	1,442,814	2,246,938	2,731,969	3,120,061
Employer Benefits & Taxes	32,487	336,180	503,648	788,762	961,051	1,099,235
Contracted Services	-	204,012	301,840	343,640	477,250	503,908
Supplies & Materials	110,465	53,865	130,099	201,270	185,028	203,149
Facility-Related Expenses	-	250,000	259,600	269,292	293,466	303,835
Other Charges	10,000	40,900	41,018	41,077	41,138	41,199
Debt Service	-	714,000	714,000	714,000	714,000	714,000
Total Expenses	338,352	2,563,258	3,393,019	4,604,981	5,403,902	5,985,388
Net Income	11,648	35,708	222,520	658	156,455	199,630
Ending Fund Balance	11,648	47,356	269,876	270,534	426,990	626,619

FACILITIES ASSUMPTIONS

	Renovation of Purchased Space	Notes
<i>Facility Profile</i>		
Total Square Foot Required	56,525	
<i>Project Cost Summary</i>		
Acquisition	\$6,000,000	Based on existing site search
Cost per Square Foot -- Hard Costs	\$120	Based on national charter school information
Hard Costs	\$6,783,000	
10% Contingency	\$678,000	
FF&E	\$250,000	furniture fixtures and equipment
Soft Costs w/ Contingency @ 13% of		
12.5% Development Costs	\$848,000	
Total Development Costs	\$14,559,000	
3% Transaction Costs	\$937,000	To cover legal costs, origination fees, etc. for LT financing
0% Debt Service Reserve Fund	\$1,300,000	Sized for one year's debt service (req'd for LT bond financing)
12 Capitalized Interest @ 12 months	\$1,001,630	To cover interest expense during construction / renovation
Total Project Costs	\$17,797,630	
<i>Financing Assumptions</i>		
Rate	7.00%	
Term	30	
Amortization	30	
Planned Equity Contribution	\$8,935,605	Assumes fundraising and/or partial commitment of cash reserves
Loan Amount	\$8,862,025	
Annual Payment	\$714,000	



FINANCIAL POLICIES AND PROCEDURES MANUAL

Updated June 2023

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Accounting Policies and Procedures

It shall be the policy of LEAD Public Schools (“LPS”) to create and maintain accounting, billing, and cash control policies, procedures and records which are consistent with Generally Accepted Accounting Principles (GAAP) and which meet the requirements of state and federal statutes and regulations.

LPS accounting, audit, and financial management policies are designed to:

1. Protect and secure the assets of LPS;
2. Ensure the maintenance of accurate records of the LPS financial activities; and
3. Ensure compliance with governmental and private funder reporting requirements.

Revenues and Expenses

1. Revenue is earned using the accrual basis of accounting.
2. Cost reimbursement grants or contracts earn revenue when the expenses are incurred (not committed).
3. Annual revenue from per pupil funding shall be accrued over a 10 month basis, beginning in August.
4. Expenses are charged directly to programs when specific identification is available.
5. LEAD will adopt a Chart of Accounts and all revenues and expenses will be recorded according to the Chart of Accounts.

Payroll Procedure

Submission Deadlines

1. Friday Before Pay Date: All new hires, pay rate changes, terminations, vacation and sick time taken, etc. must be entered into the ADP system by the manager.
2. Monday Before Pay Date: All timesheets and the attendance spreadsheet must be approved by 10 a.m. The LPS bi-weekly payroll schedule lists the specific dates and notes that earlier deadlines may occur around holidays.
3. Tuesday Before Pay Date: The Payroll and Benefits Coordinator reconciled the payroll register and is approved by the HR Director and Director of Finance.

New Hires

1. When a new employee is hired, the new hire paperwork must be filled out by LPS and retained for LPS's HR files.

Other Payroll Changes

1. Payroll changes are implemented by the manager in ADP including job title, pay rate, address and status changes, one time payments such as bonuses, leave of absences and terminations.

Timesheets

1. Timekeeping is kept within ADP. Managers must approve hourly wages before payroll processing submission deadlines.
2. If an employee works more than 40 hours in one week, they are required to receive overtime pay and will be calculated in ADP.

Data Protection

- LEAD takes care to protect Personally Identifiable Information such as social security number, passport number, financial information, medical information, date and place of birth, mother's maiden name, background check and criminal information and educational transcripts.
- Such information is contained in ADP with access by only those processing payroll.
- Employees may request written documentation in accordance with LEAD's employee manual. Other individuals will not be granted access to confidential employee information.

Expenditure Approval Policy

LPS strives to serve its students as part of the public good; therefore, it is central to LEAD's philosophy that expenses be held to a realistic minimum consistent with getting the job done. Therefore, although employees are expected to spend what is reasonably necessary to accomplish the assigned task, the least expense required to do that is the rule.

Nest Staff and Principals all are assigned portions of the Board Approved Budget in which they are expected to manage. They are responsible for making reasonable purchases and reviewing budget trends on a regular basis with the CFO. The Board of Directors Finance Committee is responsible for reviewing network wide financial results on a quarterly basis. The full Board of Directors is provided financial results and must approve the annual budget and the annual audited financial statements.

All purchases must be approved on bill.com or initiated on the purchasing card by Budget Line Item Owners. All these individuals will receive approval rights in the accounts payable system.

Expenditure Approval Limits

Items outside of Board Approved Budget:

All items that are outside of the Board Approved Budget must be pre-approved by the Manager of the person initiating the purchase. The CEO may initiate transactions outside of the Board Approved Budget.

Items within Board Approved Budget:

- In all cases, the approver(s) should be responsible for the budget management (Dean, Assistant Principal, of Network Level Direct) or be the budget owner that an item is being expensed to.
- Less than \$5K: Transactions less than \$5,000 require approval from one of the authorized individuals listed above, but do not require a second approver.
- \$5K-\$10K: All transactions exceeding \$5,000 require a second approver. The second approval will be provided by the Manager of the person initiating the purchase. Specifically, the following approvers will approve these types of purchases:
 - School Operations, Transportation, Facilities: Operations Manager & School Principal
 - Instruction, Student Support, Personnel: Deans, Assistant Principals, Network Level Directors and School Principal

- General & Administrative: Nest Exec Team Leader & Director of Finance
 - General & Administrative (Finance): Director of Finance & CFO
- \$10K or greater: Transactions exceeding \$10,000 must be approved by
 - School based: Deans, Assistant Principal, Operations (if applicable), School Principal and HOS
 - Nest based: Exec Leadership Team Member and CFO
 - Nest based (Finance): CFO and CEO
- \$20K or greater: Transactions exceeding \$20,000 must be approved by the CEO:
 - School based: HOS and CEO
 - Nest based: Exec Leadership Team Member and CEO

For recurring monthly budgeted bills in which the amount does not change on a monthly basis but exceeds \$5,000, the Director of Finance may serve as the second approver rather than the Manager. Examples of recurring, budgeted bills include:

- Rent
- Utilities, Phone & Internet
- Janitorial services
- Employee benefits bills
- General insurance bills
- Authorizer and Management fees
- Daily transportation (other transportation subject to approval rules)
- Recurring contract services such as accounting, payroll and technology services

Internal Control

As all bills will be approved on bill.com or be created by the purchase of a purchasing card, this will serve as approval for the expense.

Method of payment

All transactions exceeding \$5,000 must be made via the LEAD accounts payable process rather than through the purchasing card system. If an emergency business need exists, the CFO will have access to a purchasing card with a transaction limit of up to \$10,000 but all purchases exceeding \$5,000 on the CFO purchasing card will require CEO approval in addition to the typical approval process listed above.

Expenditure Approval Summary Table

Role	Items outside of budget	Items within budget: AP Spend Limit	Items within budget: P Card limit	Approver for items outside of budget or above Spend Limit
Operations Manager	Pre-approval required	\$5,000	\$5,000	Principal
Principal	Pre-approval required	\$5,000	\$5,000	Head of Schools
Head of Schools	Pre-approval required	\$5,000	\$5,000	CEO
Exec Leadership Team	Pre-approval required	\$5,000	\$5,000	CEO
CFO	Pre-approval required	\$10,000	\$10,000	CEO
CEO	No approval required	N/A	N/A	Board of Directors
Other Employees	Not allowed	Not allowed	\$1,000	Manager of Employee

Internal Control

As all bills will be signed off in bill.com or be created by the purchase on a purchasing card, this will serve as approval for the expense.

Contract Review

- All members of the LEAD Executive Team may sign a contract for their functional area. Contracts exceeding \$10,000 must also be reviewed by the LEAD CFO or CEO in advance of signature.
- LEAD legal counsel will review all new contracts exceeding \$10,000. Renewals to contracts with minimal changes do not need to be reviewed by LEAD legal counsel a subsequent time. LEAD legal counsel will review contracts <\$10,000 should a business need exist.
- **Contract exceeding \$50,000:**
 - Goods: In accordance with state law, the Board of Directors must approve all contracts for *goods* in excess of \$50,000 annually or upon renewal of the contract.
 - Services: In accordance with LEAD Public Schools policy, contracts for services must only be approved by the Board should they be in excess of \$50,000.
 - Upon the annual budget approval, the LEAD Board of Directors will be presented with a list of anticipated contracts that identifies the vendor and maximum annual contract amount. The budget approval will serve as an approval to all anticipated contracts outlined in the budget list. For recurring contracts with no change in language, the approval of the contract list would be sufficient and would not require the duplicate text to come to the board. Any new contracts or change in language in contract language will be presented to the board of directors but management has the authority to sign the contract prior to the board meeting if the contract does not exceed the annual contract amount presented to the Board of Directors during the annual budget approval process.

Methods of Payment

Purchasing Card

- The CEO or CFO may approve employees as cardholders and may set purchasing limits for each cardholder as necessary. All Cardholders will receive training on how to use the Card and will sign a P Card Policy statement before receiving a card (see appendix for the policy)
- All expenses must be coded in the online platform within five business days following the end of each month. A transaction description (i.e. note) and receipt must also accompany each purchase.
- All receipts must be scanned and uploaded into the online system.
- Dir Finance will reconcile PCard account statements on a monthly basis.
- P Cards will be provided to C level staff at the Nest, School Directors and Operations Managers. P Cards may also be provided to Director level staff at the Nest should a compelling business reason exist. The CFO has the discretion to issue p cards to Nest Directors.
- P Card limits are as follows:
 - a. CFO, CEO, COO: \$25K
 - b. Head of Schools, School Directors, Operations Managers: \$10K
 - c. Other staff: \$5K
- All purchases exceeding \$1,000 must be approved by the employee's manager in the online system.
- Cardholders failing to provide appropriate documentation or coding will have their p cards eliminated and may be subject to disciplinary action.

See the Purchasing Card policy in the appendix for further details.

Cash Disbursements and Accounts Payable

1. Cash disbursements are made by check or via electronic debit (with the exception of petty cash) from LPS's bank operating account.

2. The Budget owner approves all invoices that are expensed to their individual budget.
3. All approved expenses (invoices, expense reports, petty cash logs and sub pay) must be promptly e-mailed to bills@leadpublicschools.org. Physical receipts must be scanned and emailed with the expense request.
4. All expense reports picked up on Friday will be included in the weekly check processing which occurs every Wednesday.
5. Checks for payment are signed only when supported by approved invoices (checks will not be processed and signed in advance of proper invoicing approval procedures).
6. Supporting documentation is noted as paid, check number, date paid, and general ledger account code. Supporting documentation is noted as approved for payment.
7. LPS accounting staff will ensure that all costs paid through the utilization of external funding sources are recognized as ordinary, necessary, within the budget, are arms length transactions, and do not deviate from established practices of the organization.
8. A cost will be considered reasonable if, in its nature or amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the costs.

Cash

1. Bank accounts are established as required by donors and funding requirements.
2. All checks over a pre-approved threshold (\$5,000) written on LPS accounts require the approval of the CEO or CFO.
3. Individuals authorized to sign manual checks include the CEO and CFO.
4. Banks are promptly notified of all changes of authorized check signers.
5. All checks are to be pre-numbered and accounted for (used, voided, not used).
6. Voided checks are to be properly defaced and maintained. Voided checks may be shredded only after a copy has been made and sent to Dir of Finance.
7. Bank reconciliations will be completed monthly.

Travel Policy

It is the policy of LEAD to reimburse staff for reasonable and necessary expenses incurred in connection with approved travel on behalf of the company.

Travelers seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid impropriety or the appearance of impropriety. Reimbursement is allowed only when reimbursement has not been, and will not be, received from other sources. If a circumstance arises that is not specifically covered in this travel policy, then the most conservative course of action should be taken.

Business travel policies are aligned with company reimbursement rules. All business-related travel paid with LEAD funds must comply with company expenditure policies.

Authorization and responsibility

Staff travel must be authorized. Travelers should verify that planned travel is eligible for reimbursement before making travel arrangements. Within 30 days of completion of a trip, the traveler must submit a Travel Reimbursement form and supporting documentation to obtain reimbursement of expenses.

An individual may not approve his or her own travel or reimbursement. The Travel Reimbursement form must be signed by the CFO (for travel over \$1,000) or by the School Director or Operations Manager (for travel under \$1,000).

Designated approval authorities are required to review expenditures and withhold reimbursement if there is reason to believe that the expenditures are inappropriate or extravagant.

Personal funds

Travelers should review reimbursement guidelines before spending personal funds for business travel to determine if such expenses are reimbursable. LEAD reserves the right to deny reimbursement of travel-related expenses for failure to comply with policies and procedures.

Travelers who use personal funds to facilitate travel arrangements will not be reimbursed until after the trip occurs and proper documentation is submitted.

Vacation in conjunction with business travel

In cases in which vacation time is added to a business trip, any cost variance in airfare, car rental or lodging must be clearly identified on the Travel Request form. LEAD will not prepay any personal expenses with the intention of being “repaid” at a later time, nor will any personal expenses be reimbursed.

Travel Expenses/Procedures

Permissible prepaid travel expenses

Before the travel, LEAD may issue prepayments for airfare, rail transportation, rental vehicles, conference registration fees and cash advances. Applicable policies and methods of payments for these prepayments follow.

Airfare. Travelers are expected to obtain the lowest available airfare that reasonably meets business travel needs. Airfare may be prepaid by the finance office. Travelers are encouraged to book flights at least 30 days in advance to avoid premium airfare pricing. First-class tickets are not reimbursable. Coach class or economy tickets must be purchased for domestic or international flights (defined as flight time totaling less than five consecutive hours excluding layovers). A higher-priced coach ticket cannot be purchased for a subsequent upgrade in seating. Airfare may be purchased with a credit card or check through the finance office with a Request for Payment form.

Rail transportation. LEAD will prepay rail transportation provided that the cost does not exceed the cost of the least expensive airfare.

Rental vehicles. LEAD will pay for approved use of a rental vehicle. See the section on reimbursements below in this section.

Conference registration fees. Conference registration fees can be prepaid with a credit card or check through the finance office with a Request for Payment form. Business-related banquets or meals that are considered part of the conference can be paid with the registration fees; however, such meals must be deducted from the traveler’s per diem allowance. See Meals (per diem) for more detail.

Travel advances. Cash advances are authorized for specific situations that might cause undue financial hardship for business travelers. These situations are limited to staff traveling on behalf of LEAD. A maximum of 80 percent of the total estimated cost can be advanced. Expenses associated with the travel must be reconciled and substantiated within two weeks of the return date. The traveler must repay LEAD for any advances in excess of the approved reimbursable expenses. The department initiating the travel is responsible for notifying the finance office to deposit any excess funds into the appropriate departmental account. Travel advances are processed by submitting a completed Request for Payment form and Travel Request form to the

finance office. Reimbursement for any remaining expenses is processed on a Travel Reimbursement form approved by the designated approval authority.

Reimbursements

Requests for reimbursements of travel-related expenses are submitted on a Travel Reimbursement form. This form must be accompanied by supporting documentation. If the requested reimbursement exceeds 20 percent of the total pre-trip estimate, the Travel Reimbursement form must be signed by the CFO.

These forms must be submitted to the finance office within two weeks after the trip is completed. Travel Reimbursement forms not submitted within this time frame require exception approval from the CFO.

Reimbursement of travel expenses is based on documentation of reasonable and actual expenses supported by the original, itemized receipts where required. Reimbursements that may be paid by LEAD are shown below.

Airfare. If the airfare was not prepaid by the finance office, an original itemized airline receipt, an e-ticket receipt/statement or an Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made. Travelers are expected to obtain the lowest available airfare that reasonably meets business travel needs. Travelers are encouraged to book flights at least 30 days in advance to avoid premium pricing. Coach class or economy tickets must be purchased for domestic or international flights (defined as flight time totaling less than five consecutive hours excluding layovers). A higher-priced coach ticket cannot be purchased for a subsequent upgrade in seating.

A less-than-first-class ticket (i.e., business class) may be purchased at LEAD's discretion for domestic or international flights (defined as flight time exceeding five consecutive hours excluding layovers).

First-class tickets are not reimbursable.

Rail transportation. LEAD will pay for rail transportation provided that the cost does not exceed the cost of the least expensive airfare. If rail transportation was not prepaid by the finance office, an original itemized receipt, original e-ticket receipt/statement or Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made.

Automobile (personally owned—domestic travel). Drivers should be aware of the extent of coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature. Reimbursement for use of a personal automobile is based on the LEAD mileage rate. The Staff Travel Reimbursement form is required for reimbursement for all vehicle-related expenses, including gasoline, wear and tear, and personal auto insurance. Travelers may opt to request reimbursement for gasoline in lieu of the LEAD mileage rate. In these instances original, itemized receipts are required.

Automobile (rental—domestic travel). Reimbursement for a commercial rental vehicle as a primary mode of transportation is authorized only if the rental vehicle is more economical than any other type of public transportation, or if the destination is not otherwise accessible. Vehicle rental at a destination city is reimbursable. Original receipts are required.

LEAD authorizes reimbursement for the most economic vehicle available. In certain circumstances larger vehicles may be rented, with supervisory approval. The rental agreement must clearly show the date and the points of departure/arrival, as well as the total cost. Drivers must adhere to the rental requirements, and restrictions must be followed. Original receipts are required.

When vehicle rentals are necessary, LEAD encourages travelers to purchase collision damage waiver (CDW) and loss damage waiver (LDW) coverage. LEAD will reimburse the cost of CDW and LDW coverage; all other insurance reimbursements will be denied. Drivers should be aware of the extent of a coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature. Parking fees, tolls and other incidental costs associated with the vehicle use are not covered by the rental agreement. Travelers are strongly encouraged to fill the gas tank before returning the vehicle to the rental agency to avoid service fees and more expensive fuel rates.

Conference registration fees. If the conference fee was not prepaid, LEAD will reimburse these fees, including business-related banquets or meals that are part of the conference registration. Original receipts to support the payment are required. If the conference does not provide a receipt, then a cancelled check, credit card slip/statement or documentation that the amount was paid is required for reimbursement.

A prorated amount for the meals provided must be deducted from the traveler's per diem. See Meals (per diem) for more detail. Entertainment activities such as golf outings and sightseeing tours will not be reimbursed. Registration fees paid directly by an individual will not be reimbursed until the conference is completed.

Lodging (commercial). The cost of overnight lodging (room rate and tax only) will be reimbursed to the traveler if the authorized travel is 45 miles or more from the traveler's home or primary worksite. Exceptions to this restriction may be approved in writing by the CFO.

LEAD will reimburse lodging expenses at reasonable, single occupancy or standard business room rates. When the hotel or motel is the conference or convention site, reimbursement will be limited to the conference rate. Only single room rates are authorized for payment or reimbursement unless the second party is representing the agency in an authorized capacity. If the lodging receipt shows more than a single occupancy, the single room rate must be noted. If reimbursement for more than the single room rate is requested, the name of the second person must be included.

Meals (per diem). Per diem allowances are reimbursable for in-state overnight travel that is 45 miles or more from the traveler's home or primary worksite. Per diem allowances are applicable for all out-of-state travel that is 45 miles or more from the traveler's home or primary worksite. LEAD per diem rates are based on the U.S. General Services Administration Guidelines, which vary by city location. In addition to meals these rates include incidental expenses such as laundry, dry cleaning and service tips (e.g., housekeeping or porter tips).. Incidental expenses, unless specifically cited in this policy, will not be reimbursed.. Per diem reimbursements are based on departure and return times over the entire 24-hour day and are prorated accordingly.

If a free meal is served on the plane, included in a conference registration fee, built in to the standard, single hotel room rate or replaced by a legitimate business meal, the per diem allowance for that meal may not be claimed.

Receipts are not required for per diem allowances. Per diem allowances are reimbursed after the trip is completed.

Business meals. Travelers are required to follow LEAD expenditure policies when requesting reimbursement for business meals. Original itemized receipts are required.

Business expenses. Business expenses, including faxes, photocopies, Internet charges, data ports and business telephone calls incurred while on travel status, can be reimbursed. Original itemized receipts are required.

Parking. Original receipts are required for parking fees (including airport parking).. A lodging bill can be used as a receipt when charges are included as part of the overnight stay.

Telephone calls. The costs of personal telephone calls are the responsibility of the individual.

Tolls. Original receipts are required.

Miscellaneous transportation. Original receipts are required for taxi, bus, subway, metro, ferry and other modes of transportation,

Visa, passport fees and immunizations. If these items are required for international travel, their reimbursement is left to the discretion of your supervisor. If approved by the designated authority, original itemized receipts are required.

Nonreimbursable Travel Expenses

The following items that may be associated with business travel will not be reimbursed by LEAD:

- Airline club memberships.
- Airline upgrades.
- Business class for domestic flights or first class for all flights.
- Child care, babysitting, house-sitting, or pet-sitting/kennel charges.
- Commuting between home and the primary work location.
- Costs incurred by traveler's failure to cancel travel or hotel reservations in a timely fashion.
- Evening or formal wear expenses.
- Haircuts and personal grooming.
- Laundry and dry cleaning.
- Passports, vaccinations and visas when not required as a specific and necessary condition of the travel assignment.
- Personal entertainment expenses, including in-flight movies, headsets, health club facilities, hotel pay-per-view movies, in-theater movies, social activities and related incidental costs.
- Travel accident insurance premiums or purchase of additional travel insurance.
- Other expenses not directly related to the business travel.

Travel for Non-Employees

Additional costs for travel, lodging, meal or other travel expenses for spouses or other family members will not be reimbursed.

Mileage Reimbursement

LEAD Public Schools employees & consultants will be reimbursed for mileage based on the following policy:

1. Reimbursement will only be for miles driven in excess of the round-trip miles from the employee's home to their office (e.g. NeST) or campus "base"
2. Example: If a NeST employee lives 10 miles from Brick Church, then only daily work-related miles driven in excess of 20 miles will be reimbursed.
3. The reimbursement rate will track the federal mileage reimbursement rate. In 2017, the rate is \$0.535 per mile
4. Use the new Mileage Reimbursement Form/. The following must be filled out: date(s) traveled, a very brief note stating the reason for the trip (example: Nest to LMS (RT) for DOI interview), and the number of miles driven – again, only the excess miles driven as defined above – under the campus destination. Add more rows if necessary.
5. Use the mileage grid below (also found in a separate tab on the new Mileage Reimbursement Form)
6. The form will calculate the miles driven and expense reimbursement amount
7. Both the employee and their supervisor must sign the form. The CFO may approve the CEO's reimbursement.
8. Use best efforts to allow no more than a month to pass without filling out a mileage reimbursement form.
9. Use best efforts to be as economical as possible in driving no more than necessary, without sacrificing work quality.

School Cash Box Management

Lead Public School's are provided with a School Cash Box to assist with making change for athletic concessions, shirt sales, and other cash driven sales. Examples include: athletic income from games, concessions, etc.

- LPS has a strict policy that prohibits money going out of the Change Fund. Only incoming transactions are permitted.
- The Change Fund should NEVER be more than \$500.00 in total. If your cashbox totals more than \$500.00 a deposit should be made to lower the amount to less than \$500.00

Cash Security

- The School Cash Box should NEVER be more than \$500.00 in total. If your cashbox totals more than \$500.00 a deposit should be made to lower the amount to less than \$500.00.
- If the School Cash Box is being used as a change box, then the box should be locked when not collecting cash and the key should remain on the person that has signed the School Cash Box out.
- When the School Cash Box is not in use it should be stored safely in the office safe at all times.
- Only the Nest Finance Team, Office Manager, Ops Associate and Director of School Operations should have access to the safe code.
- Limit the number of people who know where the petty cash box is.
- If there are any issues of theft or fraud, notify the CFO immediately.

Cash Receipts

1. The Director of Development or Director of Operations or designee prepares a bank deposit slip, listing each item and deposits any excess balances into LEAD's bank operating account in a timely manner.
2. The bank's stamped duplicate deposit slip is attached to the remittance documentation.
3. The daily deposit log and duplicate deposit slip are forwarded to the Dir of Finance for verification, coding and data entry.

Budget

Budget Principles

1. The budgetary process shall comply with the organization's funding partners and in accordance with applicable state and federal laws.
2. The budgetary process shall comply with the guidelines and principles set forth by the Board of Directors.
3. Annually, each program area shall identify and develop a plan for its operation. The budgets needed to execute the plan shall be developed by appropriate personnel, with concurrence from the CEO.

Budget Procedures

1. The organization's CFO will prepare and submit an operating budget to the Board of Director's 30-60 days prior to the beginning of the new fiscal year and prior to submission to funding sources.
2. If budget submission is due to funding sources prior to 60 days before the beginning of the fiscal year, the organization's Board of Directors will review a preliminary budget and adopt it if necessary.

3. The approved preliminary or final operating budget will become the blueprint for the budget submission to all outside funders.
4. Differences in budget line items between the organization's operating budget and a funders' approved budgets will be resolved in negotiations between the CFO and the funding agency.

Financial Reporting Procedures

1. Accounting staff will be responsible for compiling monthly and year-to-date reports on all cost centers by revenue source, expense code, and asset and liability account balances.
2. Financial reports are reconciled to the general ledger and accounting records for all significant balance sheet accounts.
3. The CFO will review reports monthly.
4. Monthly financial reports which analyze LPS financial position and the effectiveness of its management and programs will be presented to the Board of Directors' Finance Committee at least quarterly.
5. Periodic reports will be provided to all funding sources as required by contract, such as federal grants.
6. LPS will maintain records that identify adequately the source and application of funds for all activities in accordance with LEAD's Document Retention Policy.

Audit

Audit Procedures

1. LPS contracts for an independent audit to be performed by a Certified Public Accountant (CPA) at the conclusion of each fiscal year.
2. The auditor(s) will test accounting mechanisms in accordance with generally accepted auditing standards for not-for-profit organizations and as contractually required by funding sources.
3. A formal written report of the audit will be presented to LPS Board of Directors and each principal funding source requiring such a report.
4. If during its fiscal year, LEAD exceeds established reporting thresholds for federal funding, or receives direct funding or subrecipient federal funding whereby LEAD is deemed an "auditee" or "subrecipient auditee," LEAD will comply with all federal accounting and reporting regulations including compliance with the requirements of OMB A-122, A-133, and EDGAR, including 34CFR. Specifically, LEAD will comply with the provisions of the Memorandum of Understanding and related subrecipient contracts for all federal funding.
5. Audited financials will be submitted to all relevant parties, including the State Comptroller's Office, authorizers, banks and grantees, as required. In addition, LEAD will submit audited financials according to the Governmental Accounting Standards, to the State of TN.

Federal Grants

Reasonable, Necessary Allocable Policy

The CFO, in partnership with the School Directors and Operations Manager, will submit budget requests for all federal funding to the LEA. The LEA will then approve the budget for federal funding. All expenditures must be aligned with approved budgeted items. Any changes or variations from the budget must first be approved by the CFO of LEAD and then the LEA.

When determining how will spend its grant funds, Lead Public Schools (LPS) will review the proposed cost to determine whether it is an allowable use of federal grant funds *before* obligating and spending those funds on the proposed good or service. All costs supported by federal education funds must meet the standards outlined in EDGAR, 2 C.F.R. § 200.403, which are provided in the bulleted list below. LPS must consider these factors when making an allowability determination.

- **Be Necessary and Reasonable for the performance of the federal award.** LEAD staff must consider these elements when determining the reasonableness of a cost. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision to incur the cost was made. For example, reasonable means that sound business practices were followed, and purchases were comparable to market prices.

When determining reasonableness of a cost, consideration must be given to:

- Whether the cost is a type generally recognized as ordinary and necessary for the operation of LEAD or the proper and efficient performance of the federal award.
- The restraints or requirements imposed by factors, such as: sound business practices; arm's-length bargaining; federal, state and other laws and regulations; and terms and conditions of the federal award.
- Market prices for comparable goods or services for the geographic area.
- Whether the individuals concerned acted with prudence in the circumstances considering their responsibilities to LEAD, its employees, its students, the public at large, and the federal government.
- Whether LEAD significantly deviates from its established practices and policies regarding the incurrence of costs, which may unjustifiably increase the federal award's cost. 2 C.F.R. § 200.404

While 2 C.F.R. § 200.404 does not provide specific descriptions of what satisfies the "necessary" element beyond its inclusion in the reasonableness analysis above, necessary is determined based on the needs of the program. Specifically, the expenditure must be necessary to achieve an important program objective. A key aspect in determining whether a cost is necessary is whether LEAD can demonstrate that the cost addresses an existing need, and can prove it. For example, LEAD may deem a language skills software program necessary for a limited English proficiency program.

When determining whether a cost is necessary, consideration may be given to:

- Whether the cost is needed for the proper and efficient performance of the grant program.
- Whether the cost is identified in the approved budget or application.
- Whether there is an educational benefit associated with the cost.
- Whether the cost aligns with identified needs based on results and findings from a needs assessment.

- Whether the cost addresses program goals and objectives and is based on program data.
- **Allocable to the federal award.** A cost is allocable to the federal award if the goods or services involved are chargeable or assignable to the federal award in accordance with the relative benefit received. This means that the federal grant program derived a benefit in proportion to the funds charged to the program. 2 C.F.R. § 200.405. For example, if 50% of a teacher's salary is paid with grant funds, then that teacher must spend at least 50% of his or her time on the grant program.
- **Adequately documented.** All expenditures must be properly documented.
- **Be determined in accordance with general accepted accounting principles (GAAP), unless provided otherwise in Part 200.**
- **Not included as a match or cost-share, unless the specific federal program authorizes federal costs to be treated as such.** Some federal program statutes require the non-federal entity to contribute a certain amount of non-federal resources to be eligible for the federal program.
- **Be the net of all applicable credits.** The term "applicable credits" refers to those receipts or reduction of expenditures that operate to offset or reduce expense items allocable to the federal award. Typical examples of such transactions are: purchase discounts; rebates or allowances; recoveries or indemnities on losses; and adjustments of overpayments or erroneous charges. To the extent that such credits accruing to or received by the state relate to the federal award, they shall be credited to the federal award, either as a cost reduction or a cash refund, as appropriate. 2 C.F.R. § 200.406.

Selected Items of Cost

Part 200 examines the allowability of 55 specific cost items (commonly referred to as Selected Items of Cost) at 2 C.F.R. §§ 200.420-200.475). LEAD Public Schools will follow the guidance provided for allowability in Part 200. However, the expenditure may be unallowable for a number of reasons, including: the express language of the regulation states the item is unallowable; the terms and conditions of the grant deem the item unallowable; or State/local restrictions dictate that the item is unallowable. The item may also be unallowable because it does not meet one of the cost principles, such as being reasonable because it is considered too expensive. If an item is unallowable for any of these reasons, federal funds cannot be used to purchase it.

LEAD personnel responsible for spending federal grant funds and for determining allowability must be familiar with the Part 200 selected items of cost section. LEAD must follow these rules when charging these specific expenditures to a federal grant. When applicable, LEAD staff must check costs against the selected items of cost requirements to ensure the cost is allowable. In addition, State, District and program-specific rules may deem a cost as unallowable.

Likewise, it is possible for the State and/or District to put additional requirements on a specific item of cost. Under such circumstances, the stricter requirements must be met for a cost to be allowable. Accordingly, employees must consult federal, State and District requirements when spending federal funds.

In order for a cost to be allowable, the expenditure must also be allowable under the applicable program statute (e.g., Title I of the Elementary and Secondary Education Act (ESEA)), along with accompanying program regulations, non-regulatory guidance and grant award notifications.

Frequent Types of Costs

Travel

Travel costs are the expenses for transportation, lodging, subsistence, and related items incurred by employees who are in travel status on official business of a grant recipient. Such costs may be charged on an actual cost basis, on a per diem or mileage basis in lieu of actual costs incurred, or on a combination of the two, provided the method used is applied to an entire trip and not selected days of the trip, and results in charges consistent with those normally allowed in like circumstances in the recipient's non-federally funded activities and in accordance with the recipient's written travel reimbursement policies. 2 C.F.R. § 200.474(a).

Costs incurred by employees and officers for travel, including costs of lodging, other subsistence, and incidental expenses, must be considered reasonable and otherwise allowable. In addition, if these costs are charged directly to the federal award, documentation must be maintained that justifies that (1) participation of the individual is necessary to the federal award; and (2) the costs are reasonable and consistent with the LEAD's established policy. 2 C.F.R. § 200.474(b).

See the LEAD Travel Policy for additional details.

Helpful Questions for Determining Whether a Cost is Allowable

In addition to the cost principles and standards described above, LPS can refer to this section for a useful framework when performing an allowability analysis. In order to determine whether federal funds may be used to purchase a specific cost, it is helpful to ask the following questions:

- Is the proposed cost allowable under the relevant program?
- Is the proposed cost consistent with an approved program plan and budget?
- Is the proposed cost consistent with program specific fiscal rules?
- Is the proposed cost consistent with specific conditions imposed on the grant (if applicable)?

As a practical matter, LPS should also consider whether the proposed cost is consistent with the underlying needs of the program. For example, program funds must benefit the appropriate population of students for which they are allocated. This means that, for instance, funds allocated under Title III of the Elementary and Secondary Education Act (ESEA) governing language instruction programs for limited English proficient (LEP) students must only be spent on LEP students and cannot be used to benefit non-LEP students.

Also, funds should be targeted to address areas of weakness, as necessary. To make this determination, LPS should review data when making purchases to ensure that federal funds to meet these areas of concern.

Federal Cash Management Policy/Procedures

LEAD will comply with applicable methods and procedures for payment that minimize the time elapsing between the transfer of funds and disbursement by LEAD, in accordance with the Cash Management Improvement Act at 31 C.F.R. Part 205. Generally, LEAD receives payment from the LEA on a reimbursement basis. 2 C.F.R. § 200.305. However, if LEAD receives an advance in federal grant funds, LEAD will remit interest earned on the advanced payment quarterly to the federal agency. LEAD may retain interest amounts up to \$500 per year for administrative expenses. 2 C.F.R. § 200.305(b)(9).

According to guidance from the U.S. Department of Education (ED), when calculating the interest earned on ED grant funds, in any situation where the State draws from the G5 system in advance of LEAD using non-federal funds to pay vendors and/or employees, the only events and dates that are relevant are: 1) the date on which the federal grant funds are drawn down by the State; and 2) the date on which those funds are disbursed by LEAD. Any interest earned on those funds while on-deposit in LEAD's bank account after drawdown and before disbursement must be included in the interest earned calculation.

Preparation and Submission of Federal Funds

Reimbursements

The Process to submit grant reimbursements includes:

1. Operations Manager will collect Time and Effort documentation on a monthly basis from employees.
2. The Revenue Manager will collect all related documents, including Time and Effort, Payroll records from ADP, related Invoices and required coversheets. Revenue Manager will ensure that Time and Effort documentation corresponds to the payroll records in ADP.
3. These records will be reviewed and signed by the Dir of Finance.
4. The Revenue Manager will submit these documents to the grantor and will respond to any modifications requested by the grantor within a reasonable period.

On a monthly basis, Revenue Manager will create a reimbursement request which will be reviewed and approved by the Dir of Finance and/or CFO. Reimbursement requests will be submitted to the Federal Reimbursement representative at the LEA. All reimbursements are based on actual disbursements, not on obligations. In creating a reimbursement request, LEAD will follow the guidance provided by the relevant LEA:

- ADP payroll files & employee benefit invoices for salary/benefits information are referenced and included in the support of grant submission package
- Workbooks are completed with expenses from the prior month
- Grant workbooks are submitted by the deadline provided by the LEA.

Consistent with state and federal requirements, LEAD will maintain source documentation supporting the federal expenditures [payroll records, expense backup] and will make such documentation available for the LEA, TN DOE or US DOE review upon request.

If required by the grant, cash may be segregated into a separate account for grant purposes only.

Advances

To the extent LEAD receives advance payments of federal grant funds, LEAD will strive to expend the federal funds on allowable expenditures within 72 hours of receipt. LEAD will hold federal advance payments in interest-bearing accounts, unless an allowable exception applies. LEAD will calculate interest earned on cash balances after 72 hours of receipt of advance payments.

Interest will be calculated quarterly. Total federal grant cash balances will be calculated on cash balances per grant and applying LEAD's interest rate. LEAD may retain up to \$500 of interest earned per year. Within 30 days of the end of the quarter, LEAD will remit interest earned on U.S. Department of Education grants in excess of \$500 to Department of Health and Human Services Payment Management System, Rockville, MD 20852.

Tracking of Federal Funds

Periodically, but no less than every 3 months, the CFO will review the progress year to date of spending allowable funds and will take appropriate measures to ensure that all funds are completely spend by the end of the eligible grant period.

If necessary, the CFO will submit a budget revision to the grantor. All funds requested for reimbursement must be associated with a previously approved budget. Therefore, any new expenses as per a budget amendment will not be submitted for reimbursement until an amended budget is approved by the grantor. No funds will be sought outside of the allowable grant period.

Timely Obligation of Funds

When Obligations are Made

The following table illustrates when funds are determined to be obligated under federal regulations:

If the obligation is for:	The obligation is made:

Acquisition of property	On the date which LEAD makes a binding written commitment to acquire the property
Personal services by an employee of LEAD	When the services are performed
Personal services by a contractor who is not an employee of LEAD	On the date which LEAD makes a binding written commitment to obtain the services
Public utility services	When LEAD receives the services
Travel	When the travel is taken
Rental of property	When LEAD uses the property
A pre-agreement cost that was properly approved by the Secretary under the cost principles in 2 C.F.R. part 200, Subpart E- Cost Principles.	On the first day of the project period.

34 C.F.R. § 75.707; 34 C.F.R. § 76.707.

All obligations must occur on or between the beginning and ending dates of the grant project. LEAD must liquidate all obligations incurred under the award by the deadline set by the LEA or US DOE. Any funds not obligated within the period of availability or liquidated within the appropriate timeframe are said to lapse and must be returned to the awarding agency. 2 C.F.R. § 200.343(d). Consequently, LEAD closely monitors grant spending throughout the grant cycle. LEAD Public Schools will also adhere to guidance from the LEA or US DOE about spending any awarded carryover funds within the timeframe provided.

Expense Allocation

1. Expenditures for each grant, loan, or contract are to be recorded according to the budget categories for that particular funding source. For each funding award, LPS will maintain records that allow for a comparison of outlays with approved budget amounts.
2. When there are government funds involved, LPS will follow OMB A-122 cost principles.
3. Expenses are charged to programs based upon a shared cost rationale when the direct charge can not be established.
4. Expenses are prohibited to be used for any purpose that is ineligible under a funding award.
5. When there are government funds involved, programs and grants will not be charged for OMB A-122 un-reimbursable items such as, but not limited to: entertainment, fundraising expenses, bad debts, fines or penalties or interest on debt.
6. Before LPS seeks reimbursement from a funder, it will ensure that the costs for which it is seeking reimbursement are allocable to that funder. A cost will be considered allocable to an external funding source (unless otherwise prohibited) if it is treated consistently with other costs incurred for the same purpose in like circumstances and if:
 - a. Approved by the grantor or authorizer.
 - b. The cost is incurred specifically for the award.
 - c. The cost benefits both the award and other work and can be distributed in reasonable proportion to the benefits received, or
 - d. Is necessary to the overall operation of the organization, although a direct relationship to any particular cost objective cannot be shown.
 - e. Allocable costs will be overseen by Operations Manager with ratification from the CFO.
7. Any cost allocable to a particular award or other cost objective may not be shifted to other awards to overcome funding deficiencies, or to avoid restrictions imposed by law or by the terms of any award of funds.
8. The CFO will keep a master list of all grant funded personnel, equipment and other expenses and will update and review at least quarterly, or after any budget amendment.

Time and Effort Standards

In accordance with the above policies, payroll expenses may be allocated to grant funding. The Director of Talent will ensure that personnel meet the minimum guidelines for licensure and highly qualified status, if applicable.

All employees who are paid in full or in part with federal funds must keep specific documents to demonstrate the amount of time they spent on grant activities. C.F.R. § 200.430(i)(1). In addition, employees who are paid from state and local funds, but whose salaries are used for cost sharing or matching must also keep time and effort documentation. 2 C.F.R. § 200.430(i)(4).

Charges to federal awards for salaries and wages must be based on records that accurately reflect the work performed. In accordance with 2 C.F.R. § 200.430(i)(1), these records must:

- Be supported by a system of internal controls which provides reasonable assurance that the charges are accurate, allowable, and properly allocated;
- Be incorporated into official records;
- Reasonably reflect total activity for which the employee is compensated, not exceeding 100% of compensated activities;
- Encompass both federally assisted and all other activities compensated by LEAD on an integrated basis;
- Comply with the established accounting policies and practices of LEAD and
- Support the distribution of the employee's salary or wages among specific activities or costs objectives.

Budget estimates or other distribution percentages determined before the services are performed do not qualify as support for charges to federal awards, but may be used for interim accounting purposes provided that the system for establishing the estimates produces reasonable approximations of the activity actually performed. 200.430(i)(1)(viii).

The CFO will identify any separating employees on the bi-weekly payroll reconciliation process.. If any separating employees were allocated to grant reimbursements the following will occur:

- Amend grant budget based on separation and submit new budget to grantor, if applicable
- Obtain current certification from separating employee, if applicable to grant.

UGG Time and Effort Procedures

In order to meet the above requirements, all employees who must complete time and effort forms must submit either a semi-annual certification or a personnel activity report (PAR) as required below. The type of form depends on the number of cost objectives that an employee works on.

A cost objective is a program, function, activity, award, organizational subdivision, contract, or work unit of which cost data are described and from which provision is made to accumulate and measure the cost of processes, products, jobs, capital projects, etc. 2 C.F.R. § 200.28.

All employees who work on a single cost objective must complete a semi-annual certification. The semi-annual certification must be:

1. Completed at least every six (6) months;
2. Be signed by the employee or the supervisor with direct knowledge of the work being performed;
3. Reflect an after-the-fact distribution of the actual activity; and

4. Account for the total activity for which each employee is compensated.

All employees who work on multiple cost objectives must complete PARs that support the distribution of their salaries /wages that meet the following standards:

1. Reflect an after-the-fact distribution of the actual activity;
2. Account for the total activity for which each employee is compensated;
3. Are prepared at least monthly & coincide with one or more pay periods; and
4. Are signed by the employee.

Record Retention

LEAD maintains all records that fully show (1) the amount of funds under the grant or subgrant; (2) how the subgrantee uses those funds; (3) the total cost of each project; (4) the share of the total cost of each project provided from other sources; (5) other records to facilitate an effective audit; and (6) other records to show compliance with federal program requirements. 34 C.F.R. §§ 76.730-.731 and §§ 75.730-.731. LEAD also maintains records of significant project experiences and results. 34 C.F.R. § 75.732. These records and accounts must be retained and made available for programmatic or financial audit.

The U.S. Department of Education is authorized to recover any federal funds misspent within 5 years before the receipt of a program determination letter. 34 C.F.R. § 81.31(c). Consequently, LEAD retain records for a minimum of five (5) years from the date on which the final Financial Status Report is submitted, unless otherwise notified in writing to extend the retention period by the awarding agency, cognizant agency for audit, oversight agency for audit, or cognizant agency for indirect costs. However, if any litigation, claim, or audit is started before the expiration of the record retention period, the records will be retained until all litigation, claims, or audit findings involving the records have been resolved and final action taken. 2 C.F.R. § 200.333.

See the LEAD Document Retention Policy for additional information.

Investment and Banking Policies

The LPS Board of Directors will approve the placement of assets not needed for immediate operations assuring compliance with all contractual requirements and using the principles identified below.

Principles:

- **Minimize Risk:** The Board will define a minimum risk strategy that will be reviewed annually to ensure appropriate discharge of responsibilities to donors, lenders, and contractual relationships.
- **Maximize Investment Return:** Within the parameters defined as “minimum risk”, funds will be invested at the highest area interest/return available at the time of decision.
- **Support Local Banks and Institutions if Economically Feasible:** “Local” is defined as having a physical presence for customer service within LPS’s service area.

Banking Policy

- LPS will keep all funds available not already invested in a federally insured bank.
- All assets kept in bank accounts will be in banks defined as local. “Local” is defined as having a physical presence for customer service within LPS’s service area.
- The LEAD CFO and CEO may make transfers between LEAD bank accounts in accordance with their cash management responsibility.

Borrowing Funds

- LEAD Public Schools may establish a line of credit to periodically borrow money for short term use. The Board of Directors must approve any new line of credit.
- The Board of Directors must approve all debt instruments greater than \$20,000.

Investment Policy

- LPS maintains a brokerage account with Charles Schwab to accept gifts of stock and other market investments.
- All such gifts will be liquidated within 30 days of their receipt to limit market risk exposure.
- Access to this brokerage account will be held with the CEO and CFO.

Conflict of Interest Requirements

Ethics

1. All employees will be required to sign the Ethics Compliance Policy found in the Employee Handbook, upon hire.
2. All Board of Directors members will be required to annually sign the Conflict of Interest policy;.
3. No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest.

Standards of Conduct

In accordance with 2 C.F.R. § 200.18(c)(1), LEAD maintains the following standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award and administration of contracts.

No employee, officer, or agent may participate in the selection, award, or administration of a contract supported by a federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract.

The officers, employees, and agents of LEAD may neither solicit nor accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts, unless the gift is an unsolicited item of nominal value.

LPS is committed to maintaining a positive, ethical work environment for all employees. Further, the school is also committed to facilitating open and honest communications relevant to our governance, finances, and compliance with all applicable laws and regulations. It is important that LPS be apprised about unlawful or improper behavior including, but not limited to, any of the following conduct:

- theft or fraud
- abuse or misuse of LPS's resources or assets
- financial reporting that is intentionally misleading
- improper or undocumented financial transactions
- harassment of any kind (as defined in the Personnel Policy)
- any behavior that violates the Personnel Policy or City, State or Federal laws
- any other improper occurrence regarding cash, financial procedures, or reporting

We request the assistance of every employee who has a reasonable belief or suspicion about any improper conduct. LPS values this input and each employee should feel free to raise issues of concern, in good faith, without fear of retaliation. Employees will not be disciplined, demoted, lose their jobs, or be retaliated against for asking questions or voicing concerns about conduct of this sort.

At the same time, LPS expects all employees to take this policy seriously, to use it in good faith, and to use it when necessary and in a judicious manner. Reports that are not made in good faith, or otherwise are intended to harass or annoy an employee, may result in disciplinary action, including termination.

We encourage any employee who has a concern regarding an action concerning LPS's governance, finances, ethics policy or compliance with all applicable laws and regulations to raise the concern with their School Director, supervisor, CEO or COO.

If for any reason the employee does not believe these channels of communication are adequate, the concern should be reported immediately to the chair of the Board. Anonymous reports will be accepted, and all reports

will be handled on a confidential basis. The contact information for the Board chair is below. Mark envelope: "TO BE OPENED BY ADDRESSEE ONLY PERSONAL AND CONFIDENTIAL". The Board Chair will coordinate the investigation and LPS will take appropriate action as it deems justifiable by the circumstances.

Organizational Conflicts

Organizational conflicts of interest means that because of relationships with a parent company, affiliate, or subsidiary organization, the non-Federal entity is unable or appears to be unable to be impartial in conducting a procurement action involving a related organization. 2 C.F.R § 200.318(c)(2).

Disciplinary Actions

Any employee in violation of the LPS Conflict of Interest Policy is subject to disciplinary action up to and including termination.

Mandatory Disclosure

Upon discovery of any potential conflict, the LPS shall disclose in writing the potential conflict to the federal awarding agency in accordance with applicable federal awarding agency policy. The CFO will be responsible for identifying and reporting any applicable conflict.

***Attn: Mike Honious, Board Chair
2835 Brick Church Pike
Nashville, TN 37207
615-430-4751***

Equipment & Inventory

Accounting for Fixed Assets

1. Fixed assets refer to LPS's tangible properties that have useful lives that benefit the school over a period of years. These properties include all equipment, textbooks, computers and other technology hardware, and buses.
2. Purchase of fixed assets should be made in accordance with accounts payable procedures.
3. It is the policy of the school to capitalize fixed assets with cost of \$1,000 or more with the useful life benefiting the school of three years or more. LPS will follow generally accepted accounting principals when determining whether an asset or group of assets should be classified as capital or operating.
4. In order to be capitalized, each item must cost at least \$1,000. However, an exception may be made, at the discretion of the CFO, for significant purchases of similar items in which the total exceeds \$1,000 but each item may cost less than \$1,000. An example would be bulk purchases of student computers.
5. Disposition of assets shall require the approval of the CEO or CFO. If the assets have been purchased with a federal grant, the following additional steps must be taken:
 - a. The CFO must verify with the authorizer that the sale of assets are permitted.
 - b. LEAD must receive at least three bids for the items to ensure the highest possible return on the investment.

Property Classifications

- **Equipment:** means tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by LEAD for financial statement purposes, or \$5,000. 2 C.F.R. § 200.33. For LPS, in order to be capitalized, each item must cost at least \$1,000. However, an exception may be made, at the discretion of the CFO, for significant purchases of similar items in which the total exceeds \$1,000 but each item may cost less than \$1,000.
- **Supplies** means all tangible personal property other than those described in § 200.33 Equipment. A computing device is a supply if the acquisition cost is less than the lesser of the capitalization level established by LEAD for financial statement purposes or \$5,000, regardless of the length of its useful life. 2 C.F.R. § 200.94. For LPS, in order to be capitalized, each item must cost at least \$1,000. However, an exception may be made, at the discretion of the CFO, for significant purchases of similar items in which the total exceeds \$1,000 but each item may cost less than \$1,000.
- **Computing devices** means machines used to acquire, store, analyze, process, and publish data and other information electronically, including accessories (or "peripherals") for printing, transmitting and receiving, or storing electronic information. 2 C.F.R. § 200.20.
- **Capital assets** means tangible or intangible assets used in operations having a useful life of more than one year which are capitalized in accordance with GAAP. Capital assets include:
- **Land, buildings (facilities), equipment, and intellectual property** (including software) whether acquired by purchase, construction, manufacture, lease-purchase, exchange, or through capital leases; and additions, improvements, modifications, replacements, rearrangements, reinstallations, renovations or alterations to capital assets that materially increase their value or useful life (not ordinary repairs and maintenance). 2 C.F.R. § 200.12.

LPS Inventory Procedure

All fixed assets will be physically labeled and inventoried electronically. All fixed assets will be received by the Director of Operations, checked for condition, and ensured that item matches asset that was ordered.. The COO is tasked with ensuring that all fixed assets are kept in good repair, including investing in preventative maintenance and safety measures, such as computer carts for all computers.

For each equipment and computing device purchased with federal funds, the following information is maintained:

- Serial number or other identification number;
- Source of funding for the property;
- Who holds title;
- Acquisition date and cost of the property;
- Percentage of federal participation in the project costs for the federal award under which the property was acquired;
- Location, use and condition of the property; and
- Any ultimate disposition data including the date of disposal and sale price of the property. The COO will communicate any sold, lost, stolen, or unrepairable assets to the CFO so they can be retired in all financial reporting systems.

A physical inventory of the property must be taken and the results reconciled with the property records at least once every two years.

1. The Director of Operations will oversee a walk through of each campus annually to ensure inventory control and will perform a fixed asset inventory reconciliation once every two years comparing all physical assets with electronic inventory.
2. The COO will communicate any sold, lost, stolen, or unrepairable assets to the CFO so they can be retired in all financial reporting systems.

Property/Equipment Maintenance

In accordance with 2 C.F.R.313(d)(4), LEAD maintains adequate maintenance procedures to ensure that property is kept in good condition. The COO is tasked with ensuring that all fixed assets are kept in good repair, including investing in preventative maintenance and safety measures, such as computer carts for all computers. All employees must sign and are subject to our Technology Agreement Policy below.

Lost, Damaged or Stolen Items

LEAD maintains a control system that ensures adequate safeguards are in place to prevent loss, damage, or theft of the property. Equipment that is stolen is reported to local jurisdiction of law enforcement.

Any suspicions of theft to property or equipment will be thoroughly investigated by the CFO and COO. Anyone found to violate this policy will have the value of the items withheld from their paycheck and it shall be grounds for disciplinary action, up to and including, immediate termination. In accordance with our Ethics Compliance Policy, anyone suspecting fraud at LEAD has an obligation to report it.

LPS staff devices including computers, tablets, and phones are monitored via a contracted MDM system. All school devices are monitored via Google's management GPS location system which is tied to a device's serial number. School devices are not allowed to be taken off-site. In the case of lost or stolen equipment greater than \$500 in value, the COO will conduct interviews as necessary to locate the equipment and notify the appropriate local authorities. If the equipment is not found, it will be removed from inventory during the year-end equipment inventory reconciliation.

Technology Agreement Policy (per Employee manual)

Employees are subject to the Technology Agreement policy as per LEAD employee manual:

LPS provides all Teachers and certain Support Staff a laptop and may issue a tablet, cell phone or other technology for the purpose of enhancing the employee's ability to fully carry out his/her responsibilities. Staff members who take advantage of this opportunity will be responsible for operating, maintaining and exercising control and possession of their technology at ALL times during the period that the device is on loan. The staff person should return the device to LPS in as good working condition as when it was delivered to them,

ordinary wear and tear excepted. Individuals shall reimburse LPS for repair or replacement of LPS property lost, stolen damaged or vandalized while under their care, due to gross negligence or willful abuse, including damage resulting from unauthorized downloads or alterations to existing data, with the understanding that those costs will not exceed the original cost of the lost or stolen machine. LPS reserves the right, at any time and for any reason, to exchange the device or to ask that a machine be returned. Staff members also agree not to download any illegal software onto their computer or tablet.

Use of Equipment

Equipment must be used in the program or project for which it was acquired as long as needed, whether or not the project or program continues to be supported by the federal award, and LEAD will not encumber the property without prior approval of the federal awarding agency and the pass-through entity. When no longer needed for the original program or project, the equipment may be used in other activities supported by the federal awarding agency, in the following order of priority: (1) activities under a federal award from the federal awarding agency which funded the original program or project; then (2) activities under federal awards from other federal awarding agencies.

During the time equipment is used on the project or program for which it was acquired, the equipment will also be made available for use on other projects or programs currently or previously supported by the federal government, provided that such use will not interfere with the work on the projects or program for which it was originally acquired. First preference for other use must be given to other programs or projects supported by the federal awarding agency that financed the equipment. Second preference is given to programs or projects under federal awards from other federal awarding agencies. Use for non-federally funded programs or projects is also permissible.

The COO's department monitors the availability of all equipment and once a piece of equipment is no longer needed, it is reassigned a new location both physically and electronically.

Disposal of Equipment

When it is determined that original or replacement equipment acquired under a federal award is no longer needed for the original project or program or for other activities currently or previously supported by a federal awarding agency, the shall contact the awarding agency (or pass-through for a state-administered grant) for disposition instructions.

Generally, disposition of equipment is dependent on its fair market value (FMV) at the time of disposition. If the item has a current FMV of \$5,000 or less, it may be retained, sold, or otherwise disposed of with no further obligation to the federal awarding agency. If the item has a current FMV of more than \$5,000, the federal awarding agency is entitled to the federal share of the current market value or sales proceeds.

If acquiring replacement equipment, LEAD may use the equipment to be replaced as a trade-in or sell the property and use the proceeds to offset the cost of the replacement property.

LPS does not dispose of any school equipment. It is LPS's policy to find a use for the equipment until it no longer has any useful life or value left.

School Closure

In the event that a school or school(s) were to be closed, LEAD Public Schools would follow the guidance put out by the TN Dept of Education related to school [closure](#) (see Appendix). Specifically, the Finance Team would be responsible for the following actions

- Establish a financial transition plan that outlines the school's remaining financial obligations and incoming funding to support the orderly closure of the school

- Solicit from each creditor a final accounting of an accrued and unpaid debt, including negotiating a settlement of debts if necessary.
- Contact all debtors to collect payment.
- Notification of closure to the IRS.
- Submission of final financial statements to the LEA and Dept of TN and provide a final audit to the Comptroller.
- Collect inventory of all fixed assets including funding sources and establish a fair market value for each.
- Within 45 days of the school closure, dispose of all school property according to the procedures determined by the authorizer and the federal programs staff of the authorizer. Generally, property purchased with CSP funds should first be offered to other charter schools within the same region in which the closing school is located. If no schools want the property, an auction may be held to dispose of the CSP assets.
- Work with authorizer to prioritize a payment strategy for any liabilities. Dispose of any remaining school funds in accordance with authorizer.
- Complete a School Audit pursuant to §49-2-112.

BB: Budget Narrative

Section 3.2 - Budget Narrative

As Attachment BB, present a budget narrative including detailed descriptions of budget assumptions, and revenue and expenditure projections, reflecting proposed growth over time. In this section include:

- a. How the proposed budget is adequate to ensure the proposed school model can be implemented fully and how it supports your theory of action concerning student achievement;

LEAD has strong financial management. LEAD has received an unqualified opinion (clean opinion) from outside auditors each year of its existence, and has had multiple years of budget surpluses, all of which have resulted in a strong cash position that provides a strong foundation for any future facilities needs. LEAD has met financial compliance expectations, including submitting annual budgets and audited financial statements to authorizers and the state in a timely fashion. The budget presented in this updated report does not include our Brick Church location, as it will be transferred back to MNPS for the 24.25SY.

- b. An explanation of student enrollment and TISA projections;

Enrollment Assumptions					
	Year 1	Year 2	Year 3	Year 4	Year 5
	2025-26	2026-27	2027-28	2028-29	2029-30
Kindergarten	60	60	60	60	60
1st Grade	35	60	60	60	60
2nd Grade	35	35	60	60	60
3rd Grade	0	35	35	60	60
4th Grade	0	0	35	35	60
5th Grade	0	0	0	35	35
Total Enrollment	130	190	250	310	335
Projected BEP Rate	\$ 15,811	\$ 16,285	\$ 16,774	\$ 17,277	\$ 17,795

LEAD Public Schools plans to roll out its academic program in the fiscal year 2026, starting with Kindergarten, 1st grade, and 2nd grade. Each subsequent year, we will add one more grade to our program. Our goal is to achieve full enrollment by the school year 2030-2031, at which point we anticipate having a total of 360 students. TISA rates are based on a modest 3% inflator year over year.

c. An explanation of all anticipated funding sources, including grants, state, federal, and local per-pupil eligibility, other government resources, private fundraising, eRate, student fees, donations, etc.;

State Revenue

TISA assumptions are based on guidance from the charter commission and are intended to be the primary source of funding as the school reaches full enrollment.

Federal Revenue

Title I, Title II, and IDEA:

Title and IDEA rates are based on average rates per eligible student.

CSP Startup Grant:

LEAD Public Schools intends to apply for CSP funding to help offset the initial cost of starting an elementary school. Lead Public Schools would be seeking \$400K to help offset expenses in the infant stages of the school, helping to provide initial fund balances. Lead Public School has a proven history of successfully obtaining and effectively using CSP funding, including \$2.4M of CSP school start up funding. Should this funding not come to fruition, Lead is prepared to utilize additional philanthropy to compensate.

Fundraising & Philanthropy

See section c.

d. If the budget includes fundraising or philanthropic revenue, provide detailed assumptions for how the revenue amounts were determined, and whether the funds have been awarded or are estimates.

LEAD Public Schools typically excludes philanthropic initiatives or additional school income from its budgeting process. However, LEAD Public Schools plans to initiate a new Elementary Philanthropic Campaign designed to address the initial costs associated with establishing the school. For this campaign, LEAD aims to generate \$400,000 in funding. Given that LEAD typically raises more than \$1 million annually in unrestricted funding, the goal of \$400,000 over a two-year period seems attainable.

LEAD also intends to distribute financial investments from its network reserves, amounting to \$600,000, which have been amassed from unrestricted philanthropic funds from previous years. These investments will be allocated during the planning year (\$350,000) and in year 3 (\$250,000), aiming to alleviate any early fund balance deficits that may occur as the school undergoes expansion in its enrollment.

Additionally, LEAD reserves the ability to allocate network philanthropic resources to schools as a precautionary measure in the event of lower enrollment, reductions in TISA rates, or unforeseen expenses during the school year. This flexibility ensures financial stability. Should our campaigns not raise the funding within this budget, LEAD will utilize some of its cash reserves available to cover the shortfall.

e. If the proposed school is still in the application process, the narrative should disclose where they are at in the process, the timing of when these funds will be awarded, and a contingency plan should the funds not be realized. Include evidence of awards or firm commitments. Evidence includes a letter, etc.

See above.

F. Specify the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Please note which are secured and which are anticipated and include evidence of firm commitments where applicable.

LEAD Public Schools presently possesses a \$1 million line of credit available for potential utilization. This line of credit is based on best practices; however, LEAD has never utilized its line of credit, as LEAD has strong cash management protocols and reserves. LEAD never intends to use the line of credit for budget misses, however this is an extra safety net.

g. Provide an explanation of all anticipated expenditures including those identified in Subpart III.I.d

Expenditures

LEAD Public Schools currently budgets for, and expends, the following expenses at its existing schools. Anticipated rates are based on average current usage, and in some cases, have been updated based on either new school start up costs, or updated for elementary students.

Compensation, Benefits and Tax Expenses

Personnel expenditures in the 25.26 budget are determined based on recommended staffing and on average salaries. Staffing models are adjusted by enrollment as the school adds grade levels and serves additional students. The projections assume a consistent 4.5% annual increase in teacher salaries, derived from our network historical averages. While our performance compensation program generally yields annual increases of around 5-6%, we do not account for turnover in this calculation, so the actual impact is typically 4.5%. Employee insurance benefits are based on current averages and are expected to increase at 5% per year. Retirement is based on average rates and increases proportionally to salaries.

Contracted Services: All expenditures listed below are increased annually based on a 2% inflation rate and expected growth year over year, unless otherwise noted:

- Professional Development: Most professional development is conducted in house or through conferences within a typical year. The budget includes costs associated with professional development supplies and materials, costs associated with attending conferences, or having contract service providers come into the school. Based on a \$1200 per FTE initial rate.
- Audit Services: Typically paid for at the network, but included the school's portion for transparency.
- Legal Fees: Typically paid for at the network, but included the school's portion for transparency.

- Copier Lease and Usage: The school has budgeted \$58 per student related to copier usage (and paper usage) per year.
- Internet and Phone Service: Based on a \$5600 per year initial rate.
- Payroll Service: Typically paid for at the network, but included the school's portion for transparency.
- Health Services: LEAD contracts nursing services and plans to have a shared nurse in years 1-3 and transition to a dedicated nurse in years 4-5. As a backup, Office and operations staff are also fully trained in medication training, CPR, and emergency response protocols. Rates are based on current contracts and historical trends and include Health Supplies.
- Transportation: Transportation costs are determined by the number of routes and the contractual cost per route as specified in our multi-year transportation agreement. As per the terms of our signed contract, we have factored in a 4% annual inflation rate. Our forecasts are based on the assumption of one route in the initial year, two routes in the second and third years, and three routes in the fourth and fifth years. Should any year require additional buses beyond the project, LEAD would add the bus that the school requires, thus lowering the fund balance from \$94K to \$29K in year 1, for example. Should exceptional educational buses be required, we would utilize our existing exed routes already in the area for our other schools.
- IT Services: The IT service expenses outlined in this budget encompass the costs associated with technology repairs offered by our outsourced provider and providing technology support to staff for both student and faculty technology requirements. These expenses are estimated at an initial rate of \$20,000 per year.
- Contracted SpEd Services: This encompasses all school psychology, OT, PT and language support services. In this category, we also allocate budget resources for contracted services that offer specialized support to students, ensuring that these services meet or surpass the Individualized Education Programs (IEPs) or 504 plans. Costs associated with ExEd contract services are included in this category and are based on average costs of the current needs of our students. We have budgeted \$175 per student in the initial assumptions.
- Insurance: Typically paid for at the network, but included the school's portion for transparency.

Supplies and Materials:

- Textbooks: This includes all educational materials, resources, and intervention tools. The school has budgeted \$96 per new student for textbooks.
- Education Software: The school has budgeted \$22 per student for education software.
- Student Supplies: This encompasses student disposable supplies and athletic-related expenditures. Student disposable supplies cover both mandated teacher reimbursements and general student supplies. Athletic expenses comprise coach stipends, referee payments, supplies, equipment, and transportation costs. The school has budgeted \$25 per student for student supplies.

- Faculty Supplies: The majority of school supplies are budgeted in student supplies, office supplies, library books and other categories.
- Library Books: The school has a budget \$50 per student each year for library books every year.
- Testing & Evaluation: The school has a budget of \$19 per student for testing and evaluations.
- Student Laptops: The school has budgeted \$400 per new student for student laptops, with the assumption that the refresh cycle for laptops occurs every three years.
- Faculty Laptops: The school has budgeted \$1,250 per new FTE for faculty laptops, with the assumption that the refresh cycle for laptops occurs every three years.
- Office Supplies: The school has budgeted \$72 per student for Office Supplies.
- Printing Paper: Estimated for \$20K annually based on network historical spend.
- Marketing Materials: Added a small marketing budget to capture miscellaneous supplies specific to the school, however, the network provides LEAD Public Schools marketing materials with the network budget.
- Student Awards: This category covers various student incentives, such as promotional merchandise and school dances. At LEAD, we take great pride in acknowledging and rewarding diligent effort. Additionally, this line item also includes extra expenses related to promoting social-emotional learning, fostering student happiness, enhancing access to college and career opportunities, and supporting extracurricular activities. The school has initially budgeted \$35 per student for student incentives.
- Staff Awards: This category includes all staff initiatives, including swag and celebrations. LEAD prides itself on rewarding hard work. The school has initially budgeted \$75 per FTE for staff incentives.

Facilities:

- Utilities: The utility cost estimates are derived from historical usage trends in phone, electricity, gas, and water services. Initial estimates are \$90K per year.
- Custodial: The school has an initial budget of \$130,000 per year, which is estimated to cover the existing network custodial contracts.
- Faculty Furniture: Included in Debt Services assumptions.
- Student Furniture: Included in Debt Services assumptions.
- Internet/Network Equipment: Included in Debt Services assumptions.
- Building Maintenance: The school has allocated an initial budget of \$10,000 per year, with COLA increases applicable only for years 1 to 3. Starting in year 4, the maintenance budget increases to \$15,000 and continues to grow with COLA adjustments for ongoing building maintenance. These rates are based on our existing contracted facilities management company.

BB. Budget Narrative

- Other-Aftercare Loss: LEAD Public Schools intends to provide aftercare services for students and intends to charge a nominal fee to families for these services. However, we acknowledge that not all of our expenses will likely be covered by families, so LEAD has budgeted for minor losses in this regard.
- Other-Summer School:: LEAD Public Schools plans to offer summer school programs for students. Our budget includes gradual increases to accommodate growth and progressively higher investments year after year.

Other Charges

Student Recruitment and Family Engagement: Student recruitment expenses encompass all costs linked to the recruitment of students and family engagement events. These expenses cover items such as communication platforms, community events, and promotional items. The school has initially budgeted \$2,900 per year. Additional budget for network wide initiatives, including brand recognition and staffing, are accounted for at the network level.

Authorizer Fee: Authorizer fees are 3% of TISA revenue capped at \$35,000 annually.

Debt Service: Future Facilities Assumptions: LEAD Public Schools has allocated an annual budget of \$714,000 for debt service. This amount is determined based on the renovation of acquired space spanning 56,525 square feet, with acquisition costs of \$6 million, an intended equity contribution of \$8.9 million, and an interest rate of 7%. It encompasses expenses for furniture, fixtures, and internet network infrastructure. For further details and additional calculations, please refer to the attached budget document.

h. Describe the systems, processes, and policies by which the proposed school will manage accounting, purchasing, payroll, and audits. Include any draft policies on financial controls;

LEAD Public School's fiscal policies and procedures are included in Attachment BB.2

i. Describe how the proposed school will provide an independent annual audit of school-level operations and comply with other federal or state accounting and/or reporting requirements;

The school has contracted with an auditor to complete the financial and internal control audit for the school to be submitted to its authorizer by December 31 each year. Annual audits are prepared by independent, external auditors. Audited financials and 990s are reviewed and approved annually by both the Finance Committee and LEAD Board of Directors. LEAD hires a full accounting staff to ensure compliance with all reporting requirements.

j. Provide the different roles and responsibilities of the proposed school's administration and governing board for school finances;

LEAD's CFO coordinates all finance and accounting activities at all schools, including the annual audit, and cash management. The CFO is responsible for the creation and implementation of school budgets, including quarterly update meetings with School Principals to discuss budget and actual expenditures. The CFO serves as the staff lead on the Finance Committee of the Board of Directors and manages payroll, accounts payable/receivable, budget amendments, financial reporting, and bank reconciliations. The LEAD CFO supervises a team of several accounting professionals to ensure that timely, accurate and compliant financial

At LEAD, each School Leadership Team (SLT) is expected to manage their actual expenditures to their budget. Principals review and revise the Personnel components, as they are the primary drivers of staffing decisions. In the pursuit of training all members of the SLT to take on more responsibility, the Asst Principals of Instruction and Students manage the Instructional and Student Support budgets, respectively and the Director of School Operations manages the School Operations, Transportation and Facilities budgets. All members of the SLT are trained by, monitored and supported by the network finance staff in this process.

The CFO is supported by the LEAD Public Schools Board and Finance Committee. The LEAD Board of Directors is ultimately responsible for the financial compliance and performance of the LEAD network as a whole. Proposed budgets and actual financial performance is shared and reviewed first at the Finance Committee meeting and then shared with the full board at the following Board meeting. The Finance Committee also reviews any substantial changes or updates to financial procedures, staffing or financial compliance. The Board approves the annual budget, annual audit, 990, contracts and other major financial investments. The Board of Directors arranges annually for an independent certified public accounting firm to conduct an audit of LEAD's financial statements. The Finance Committee of the Board of Directors nominates the independent auditor and reviews the scope and results of the audit. The Finance committee receives notice of any consequential irregularities and management letter comments that the auditor noted during the engagement. Additionally, the Committee develops any policies or action plans necessary to address relevant weaknesses noted by the auditor. The Committee will also review all financial information of LEAD and provide recommendations to the Board of Directors.

k. If there is a plan to outsource any financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., include a statement on how you will choose and oversee the contractors;

LEAD Public Schools is at the scale necessary to hire dedicated internal resources to almost all financial and HR responsibilities. LEAD intends to outsource the annual audit which is required to be completed by an independent third party. All vendors will be chosen in compliance with state law utilizing the proper RFP processes.

l. the level of financial expertise of the proposed school's internal and external team members;

Ashley Montgomery, Chief Financial Officer

Ashley Montgomery is the current Chief Financial Officer (CFO) at LEAD Public Schools. She has been with LEAD Public Schools for five years, where she initially served as a finance analyst and later as the Director of Finance. Before joining LEAD, Ashley accumulated a decade of experience managing financial operations for a manufacturing facility in middle Tennessee. She holds a Bachelor of Science degree in Accounting.

Sheena Moore, Senior Accountant

Sheena Moore is the current Senior Accountant at LEAD Public Schools, with extensive experience in financial management and accounting. Sheena has worked with LEAD for three years and manages the day to day accounting. Her previous experience includes serving as a Senior Lease Accountant at GEODIS Americas, where

she focused on real estate lease accounting, and she has also contributed to the financial oversight of charter schools at ALS Education Inc. Sheena holds a Bachelor's in Business Administration in Accounting from Tennessee State University, and she is committed to maintaining financial accuracy and compliance at LEAD Public Schools.

Rose Freeman, Finance Analyst

Rose Freeman has a B.A. in Economics from Vanderbilt University and got her first accounting experience working for her alma mater in the Athletics Department. After obtaining her CPA license in 2016, she has gathered finance experience in a variety of industries, from restaurants to real estate, to manufacturing. She has 10+ years of experience in managerial accounting, including 4 years leading the accounting department at a local craft distillery. In her current role as Financial Analyst at Lead Public Schools, she assists the finance department by monitoring and forecasting current and future financial performance, leading implementation of new accounting tools and software, and providing ad-hoc analysis to leadership for critical decision making.

m. the proposed school's contingency plans to meet financial needs if anticipated revenues are not received or are lower than expected;

LEAD Public Schools purposefully provides conservative estimates of both revenue rates, enrollment and major expenses, such as personnel, in order to ensure that school budget targets are met. However, should the anticipated revenues come in lower than estimated to a point where the projected operating surpluses are not enough to cover the decrease in such revenues, LEAD would consider the following options and will evaluate them based on minimizing impact to the academic programming of the schools. Options include increasing grant or philanthropic fundraising, reducing management fees, increasing student enrollment, cutting back on discretionary supplemental materials or supplies, and finally, foregoing backfilling non-teaching vacant positions across the network.

n. the cash flow contingency, in the event that revenue projections are not met in advance of opening including

If LEAD was concerned about temporary cash flow, we would dip into our current cash reserves. In addition, LEAD board annually approves an operating budget that evidences a positive cash position at year end and has obtained a line of credit from Capstar Bank to smooth cash flow if necessary; however this line of credit has never been required in the history of LEAD.

o. plan explanation and evidence of sources and financing terms if the contingency plan includes loans, commitments from an outside donor, or alternative funding source; and

LEAD Public Schools has a line of credit available amounting to \$1,000,000 through CapStar bank. Although LEAD has not previously had to utilize this funding, it serves as a valuable resource for addressing cash contingencies. However, Lead currently has a cash balance of over \$20M and would use that first.

p. how one or more high-needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated.

BB. Budget Narrative

We have allocated a substantial budget for high-needs students, which includes provisions for paraprofessionals. However, if we exceed our budget due to unanticipated student needs, our approach would be consistent with our overall financial management strategy. We would initially explore cost-saving measures within other discretionary spending areas. In rare situations where additional funding is necessary, we can rely on the robust financial backing of our network to cover unexpected costs.

BB. Budget Narrative

24-25 Anticipated Budget: LEAD Public Schools Network

Enrollment **2310** **Based on current 24.25 Budget proposal plus 2 schools**

Revenue

State Revenues

	Budget	Assumption Notes
TISA	\$ 38,061,870	Based on blended TISA rate of \$16,477
Turnaround Action Grant	\$ 89,172	Proportional to current rates (\$ per total ADM)
Charter School Facilities (Competitive)	\$ 750,000	Based on current GAN and expected expenditures
Charter School Facilities (per pupil)	\$ 693,000	Based on estimated rate of \$300 per pupil

Federal Revenues

Title I	\$ 1,714,020	Proportional to current rates (\$ per total ADM)
Title II	\$ 141,283	Proportional to current rates (\$ per total ADM)
Title III	\$ 29,348	Proportional to current rates (\$ per total ADM) (NB Only)
Title IV	\$ 1,988	Proportional to current rates (\$ per total ADM) (NB Only)
IDEA	\$ 534,431	Proportional to current rates (\$ per total ADM)
TSL Grant	\$ 4,302,831	Current 24.25 Grant Allocations
CSP Startup Grant		

Fundraising & Philanthropy **\$ 1,945,000** **Based on 23.24 Budget and projections**

Total Revenues **\$ 48,262,942**

EXPENSES

PERSONNEL EXPENSES

Salaries and Wages	\$ 26,386,129	Includes School Wages and Network Wages
Total Employer Benefits & Taxes	\$ 6,297,592	
Total Personnel Expenses	\$ 32,683,721	

Operating Expenses

Instructional Expenses	\$	2,005,658	Based on current proposed budget- plus two elementary schools
Student Support Expenses	\$	416,417	Based on current proposed budget- plus two elementary schools
School Operations	\$	2,037,347	Based on current proposed budget- plus two elementary schools
Facility Related Expenses	\$	4,482,783	Based on current proposed budget- plus two elementary schools
Transportation	\$	3,085,507	Based on current proposed budget- plus two elementary schools
Total Operating Expenses	\$	12,027,712	

Authorizer Fee	\$	301,018	MNPS & TN Charter Commission Fees

Network General & Administrative Costs

Financial Services	\$	51,500	Accounting and billing systems; Bank Fees
Audit Services	\$	72,100	Annual financial audit
Legal Fees	\$	51,500	Legal fees
Professional Development	\$	103,000	Executive Coaching supports
LEAD University	\$	46,350	Annual Summer PD
Office & Admin supplies & equipment	\$	30,900	Network (home office) supplies
Senior Signing Day	\$	103,000	Annual celebratory student event
IT Contract Services	\$	463,500	Outsourced IT Support
HR & Payroll Fees	\$	103,000	HRIS system, benefits administration
General Liability Insurance	\$	87,550	Liability, D&O, Property Insurance
Fundraising Expenses	\$	51,500	Fundraising software, materials, postage
Marketing & Communications	\$	103,000	PR support, branding, video, marketing materials, signage
Staff Recognition & Events	\$	20,600	Staff celebratory events
Talent Recruitment	\$	77,250	Recruitment platforms, career fairs, travel
Family Engagement	\$	15,450	Philanthropy funded support of LEAD families
Academic Contracted Services & Consulting	\$	206,000	External Instructional Coaching; PD on curriculum, etc
Network Facilities Costs	\$	30,900	Office & facilities expense for network team
Data Infrastructure	\$	206,000	Computer Software, SIS integration, Data platforms
Total General & Administrative Costs	\$	1,823,100	

Total Expenses	\$	46,835,551

Total Revenue	\$	48,262,942

Total Expenses	\$	46,835,551	
EBITDA	\$	1,427,391	
Interest Income	\$	200,000	Interest earned on cash
Depreciation	\$	1,500,000	Network wide depreciation
Net Income	\$	127,391	
Capital Investments			
Building Improvements	\$	900,000	Building improvements, HVAC replacements, capital repairs
Furniture & Fixtures	\$	25,750	Furniture replacements, as needed
Technology	\$	515,000	Annual refresh of student, staff computers & classroom tech
Total Capex	\$	1,440,750	
Net Cash	\$	186,641	

LEAD Public Schools

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

Attachment EE
LEAD Public Schools Internal Assessment Data
2023-2024

Internal Assessment 1 to Interim Assessment 2

LEAD Neely's Bend IA1 to IA2				LEAD Brick Church IA1 to IA2			
<u>Subject</u>	2022 TCAP Prof/Adv	IA 1 Prof/Adv	IA 2 Prof/Adv	<u>Subject</u>	2022 TCAP Prof/Adv	IA 1 Prof/Adv	IA 2 Prof/Adv
5th Math	11.10%	5.00%	5.00%	5th Math	0.00%	16.00%	8.00%
6th Math	7.20%	8.00%	4.00%	6th Math	4.50%	10.00%	14.00%
7th Math	9.10%	22.00%	9.00%	7th Math	7.80%	12.00%	18.00%
8th Math	13.10%	13.00%	7.00%	8th Math	10.60%	4.00%	16.00%
5th ELA	0.00%	5.0%	5.00%	5th ELA	11.10%	0.0%	0.00%
6th ELA	9.70%	4.0%	11.00%	6th ELA	10.30%	8.0%	15.00%
7th ELA	12.50%	15.0%	16.00%	7th ELA	3.90%	9.0%	13.00%
8th ELA	6.50%	6.0%	11.00%	8th ELA	2.80%	6.0%	8.00%
5th Sci	0.00%	18.0%	4.00%	5th Sci	0.00%	0.0%	3.00%
6th Sci	8.90%	8.0%	19.00%	6th Sci	7.40%	13.0%	3.00%
7th Sci	17.40%	6.0%	12.00%	7th Sci	11.50%	4.0%	18.00%
8th Sci	14.00%	23.0%	12.00%	8th Sci	15.80%	20.0%	9.00%
5th Soc	N/A	28.00%*	0.00%	5th Soc	N/A	4.00%	10.00%
6th Soc	17.60%	5.00%	6.00%	6th Soc	12.00%	16.00%	13.00%
7th Soc	16.60%	23.00%	25.00%	7th Soc	6.00%	12.00%	25.00%
8th Soc	13.10%	8.00%	16.00%	8th Soc	9.30%	0.00%	8%

	LEAD Cameron IA1 to IA2				LEAD Southeast IA1 to IA2		
<u>Subject</u>	2022 TCAP Prof/Adv	IA 1 Prof/Adv	IA 2 Prof/Adv	<u>Subject</u>	2022 TCAP Prof/Adv	IA 1 Prof/Adv	IA 2 Prof/Adv
5th Math	25.00%	26.00%	25.00%	5th Math	29.10%	34.00%	29.00%
6th Math	7.00%	19.00%	8.00%	6th Math	10.60%	22.00%	27.00%
7th Math	12.90%	11.00%	15.00%	7th Math	22.20%	23.00%	26.00%
8th Math	17.50%	3.00%	5.00%	8th Math	50.00%	15.00%	16.00%
5th ELA	21.90%	17.00%	34.00%	5th ELA	19.40%	29.00%	34.00%
6th ELA	8.50%	11.00%	11.00%	6th ELA	10.60%	25.00%	27.00%
7th ELA	10.90%	7.00%	9.00%	7th ELA	23.10%	7.00%	17.00%
8th ELA	8.10%	12.00%	10.00%	8th ELA	11.80%	16.00%	18.00%
5th Sci	31.20%	32.00%	28.00%	5th Sci	31.20%	34.00%	23.00%
6th Sci	12.10%	16.00%	10.00%	6th Sci	18.60%	33.00%	42.00%
7th Sci	28.40%	11.00%	27.00%	7th Sci	44.20%	24.00%	31.00%
8th Sci	13.80%	17.00%	66.00%	8th Sci	33.60%	42.00%	22.00%
5th Soc	N/A	30	31.00%	5th Soc	N/A	55.00%	68.00%
6th Soc	30.30%	16.00%	25.00%	6th Soc	29.20%	32.00%	35.00%
7th Soc	21.40%	21.00%	22.00%	7th Soc	38.50%	26.00%	33.00%
8th Soc	16%	18.00%	13.00%	8th Soc	30.90%	32.00%	43.00%

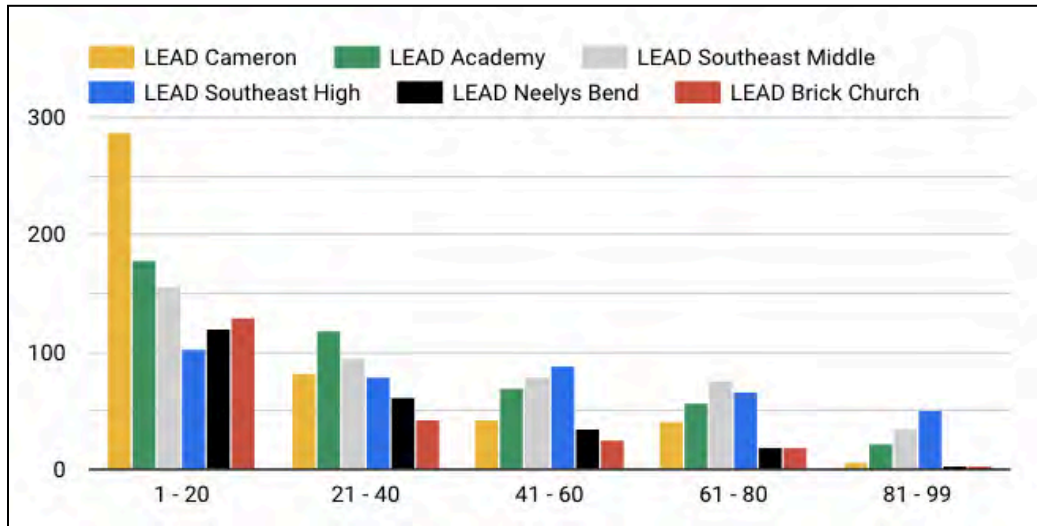
<u>Subject</u>	<u>23 EOC</u>	<u>LAHS IA1</u>	<u>LAHS IA2</u>	<u>Subject</u>	<u>23 EOC</u>	<u>LSEH IA1</u>	<u>LSEH IA2</u>
Eng 1	16.8%	9.5%	15.6%	Eng 1	18.55%	23.1%	25.9%
Eng 2	29.2%	16.2%	19%	Eng 2	50.48%	31.8%	34.2%
IM 1	10.57%	13.6%	9.6%	IM 1	21.77%	30.0%	41.1%
IM 2	9.09%	10.8%	10.1%	IM 2	14.92%	15.4%	24.3%
IM 3	7.43%	9.7%	16.1%	IM 3	16.81%	26.1%	35.1%
Biology	na	33.9%	37.7%	Biology	39.37%	47.1%	46.7%
US History	30.19%	18.4%	29.2%	US History	42.67%	53.4%	56.0%

MAP Scores - Fall to Winter 2023-2024

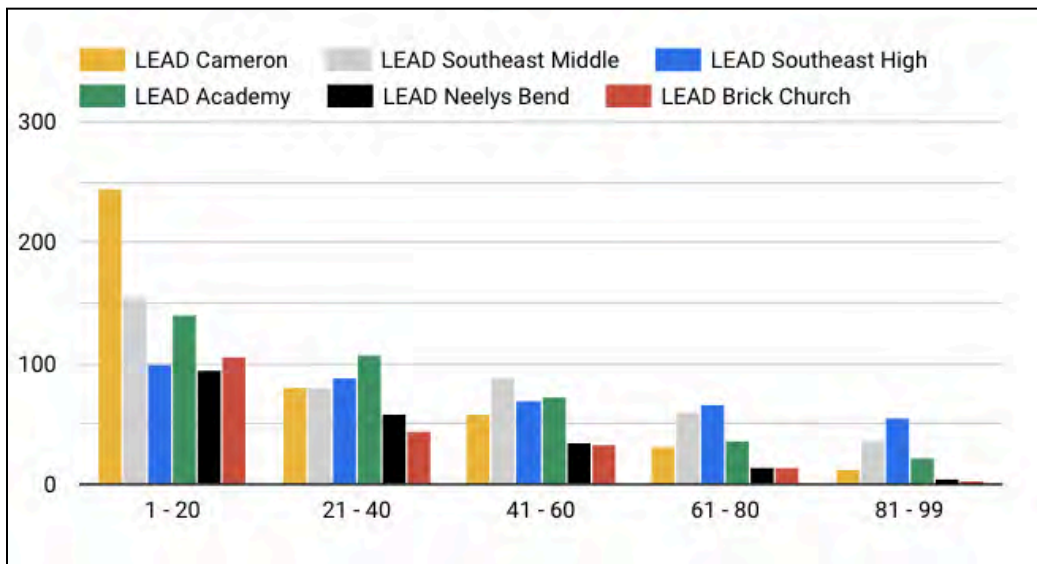
NWEA MAP: Network Winter Comparison

Mathematics	Demonstrating Growth: Overall	Average Years of Growth @ Semester	On Track to Meet 1 Year Growth Goal	On Track to Meet 1.5 Year Growth Goal
LEAD Southeast Middle (5-8)	70.95%	0.46	49.77%	34.77%
LEAD Southeast High (9-11)	55.03%	0.41	47.76%	39.05%
LEAD Neely's Bend	77.91%	0.48	40.98%	27.80%
LEAD Cameron	84.71%	0.76	58.71%	43.53%
LEAD Brick Church	72.11%	0.42	40.80%	26.46%
LEAD Academy	TBD	TBD	TBD	TBD
Reading	Demonstrating Growth: Overall	Average Years of Growth @ Semester	1 Year Growth Goal	1.5 Year Growth Goal
LEAD Southeast Middle (5-8)	63.11%	0.36	47.58%	32.79%
LEAD Southeast High (9-11)	55.23%	***	50.40%	43.27%
LEAD Neely's Bend	74.26%	0.58	42.17%	35.54%
LEAD Cameron	73.47%	0.54	50.12%	37.59%
LEAD Brick Church	70.30%	0.44	37.14%	26.53%
LEAD Academy	TBD	TBD	TBD	TBD

NWEA MAP Scores: Distribution by Quintile Fall 2023-2024



NWEA MAP Scores: Distribution by Quintile Winter 2024



Attachment FF

**LEAD Public Schools Network Results
State Assessments**

LEAD Public Schools Network TVAAS Results

LEAD Public Schools: Network TVAAS Results							
School	Year	Composite	Schoolwide Literacy	Schoolwide Numeracy	Schoolwide Literacy & Numeracy	Schoolwide Science	Schoolwide Social Studies
LEAD Brick Church	2022-23	3	3	2	3	5	3
LEAD Brick Church	2021-22	5	4	5	5	2	5
LEAD Neely's Bend	2022-23	5	5	4	5	4	4
LEAD Neely's Bend	2021-22	5	3	5	5	5	3
LEAD Southeast Middle	2022-23	5	1	5	5	5	5
LEAD Southeast Middle	2021-22	5	4	5	5	4	4
LEAD Southeast High	2022-23	5	5	5	5	5	5
LEAD Southeast High	2021-22	5	5	3	5	5	5
LEAD Cameron	2022-23	5	3	5	5	5	5
LEAD Cameron	2021-22	5	5	5	5	5	5
LEAD Academy	2022-23	4	5	2	3	NA	3
LEAD Academy	2021-22	1	2	1	1	2	1

LEAD Public Schools Success Rate Performance

LEAD Public Schools Success Rate Performance		
Success Rate	2021-22 Success Rate	2022-23 Preliminary Success Rate ¹
LEAD Cameron	11.9%	16.0%
LEAD Brick Church	5.7%	10.3%
LEAD Neely's Bend	10.3%	12.9%
LEAD Southeast (Combined)	19.5%	25.8%
LEAD Academy	15.4%	17.4%

LEAD Public Schools Proficiency by Subject Area

LEAD Public Schools Proficiency by Subject Area				
School Year	21-22 Overall	22-23 TDOE Confirmed Proficiency Grades 3-5	22-23 TDOE Confirmed Proficiency Grades 6-8	22-23 TDOE Confirmed Proficiency Grades 9-12
	English Language Arts			
LEAD Brick Church	5.80%	n/a (Insufficient Data)	8.7%	n/a
LEAD Neelys Bend	10.40%	n/a (Insufficient Data)	11.7%	n/a
LEAD Cameron	11.50%	26.7%	10.3%	n/a
LEAD Southeast	21.50%	19.1%	15.1%	34.8%

¹ All 22-23 TNReady data contained within the application represents the most updated information available from the TDOE or or authorizers as of 1/22/24. Some data is preliminary as we await final state calculations. Overall success rates for 2022-23 are based on data from A-F Dashboard and include ELA, math, social studies and science. 2021-22 success rates are based on data from the TN State Report card and include data from ELA and math only.

LEAD Academy	17.10%	n/a	n/a	23%
	Math			
LEAD Brick Church	5.80%	n/a (Insufficient Data)	9.7%	n/a
LEAD Neelys Bend	10.50%	n/a (Insufficient Data)	11%	n/a
LEAD Cameron	11.80%	30.0%	13.2%	n/a
LEAD Southeast	16.10%	27.8%	26.2%	12.8%
LEAD Academy	5.10%	n/a	n/a	9.8%
	Science			
LEAD Brick Church	4.10%	n/a (Insufficient Data)	13.7%	n/a
LEAD Neelys Bend	13.20%	n/a (Insufficient Data)	15%	n/a
LEAD Cameron	18.70%	40%	19.6%	n/a
LEAD Southeast	22.20%	30.9%	32.3%	39.8%
LEAD Academy	10%	n/a	n/a	n/a (Insufficient Data)
	Social Studies			
LEAD Brick Church	13.60%	n/a	11.8%	n/a
LEAD Neelys Bend	18.30%	n/a	17.70%	n/a
LEAD Cameron	26.60%	n/a	24.2%	n/a
LEAD Southeast	34.40%	n/a	33.2%	41.7%
LEAD Academy	8.10%	n/a	n/a	29.9%

LEAD Cameron College Prep

Academics: Pursuant to T.C.A § 49-13-102, two of the purposes of a charter school are to improve learning for all students and to ensure that children have the opportunity to reach proficiency on state academic assessments. In addition, the law states that “[t]he performance-related provisions within a charter agreement shall be based on a performance framework that clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the authorizer's evaluation of each public charter school.” The academic performance framework is made up of three key areas. Student Achievement (50%) Comparative Performance (30%) and School Culture (20%).

Overall Achievement Metrics

Sub-Category	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
	Points Total		1	2	3	4	
Absolute Achievement	Absolute performance in ELA, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in math, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in science, as measured by Tennessee State Assessments - Percent of students scoring On Track/Mastered	All	Less than 40%	40%-49.9%	50%-70%	Greater than 70%	8.3%
Growth	TVAAS overall composite index	All	Level 1	Level 2	Level 3	Level 4 & 5	20%
Chronic Absenteeism	The percent of students missing 10 percent or more of enrolled school days	HS	Greater than 30%	20.1-30%	10.1%-20%	10% or less	5%
		K-8	Greater than 20%	13.1%-20%	6.1%-13%	6% or less	

Comparative Performance Metrics

Measure	Description		Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
2a	School comparative performance to authorizing district average in ELA	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2b	School comparative performance to authorizing district average in math	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2c	School comparative performance to authorizing district average in science	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2d	School comparative performance to authorizing district average in social studies	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%

School Culture Metrics

Measure	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
3a	Suspension rate	ES	5% or more	4%-4.9%	3%-3.9%	Less than 3%	5%
		MS	20% or more	13%-19.9%	5%-12.9%	Less than 5%	
		HS	10% or more	8%-9.9%	4%-7.9%	Less than 4%	
3b	Student attrition rate	All	35% or more	25%-34.9%	15%-24.9%	Less than 15%	5%
3c	Teacher retention rate	All	Less than 65%	65%-74.9%	75%-84.9%	85% or more	5%
3d	Student attendance rate	All	Less than 90%	90%-93.9%	94%-96.9%	97% or more	5%

Academic	2022-2023	Rating
ELA	12%	1
Math	14%	1
Science	21%	1
Social Studies	25%	NA
Growth	5	4
Chronic Absenteeism	33.6%	1
Overall Achievement ()		1.1
ELA	-13%	2
Math	-11%	2
Science	-7%	2
Social Studies	-5%	3
Comparative Performance ()		0.7
Suspension Rate	10.3%	3
Student Attrition Rate	32%	2
Teacher Retention Rate	87%	4
Student Attendance Rate	91%	2
School Culture ()		0.55
Overall APF	2.35	

Rating	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard
Points	1	2	3	4

Financials: The following financial data is pending for the 2023 Annual Financial Report. The data from the reports were used to reflect each charter school's financial health and sustainability. The ratings will be based on and align with the 2023 Performance Framework,

Section II Near Term Indicators and Sustainability indicators. Any indicator missing a standard rating will be updated in the Spring of 2024 based on the charter school's submission of the Annual Financial Report.

LEAD Cameron College Prep		
Section II Financial Performance		
Indicators and Measures	Outcomes:	Standards:
Near Term Indicators:		
1(a) Current Ratio		
1(b) Unrestricted Days Cash		
1(c) Enrollment Variance	94%	Does not meet standard
1(d) Debt Default		
Sustainability Indicators:		
2(a) Total Margin		
2(b) Debt to Asset Ratio		
2(c) Cash Flow		
2(d) Debt Service Coverage Ratio		

Operations: Charter schools are required to meet certain regulatory requirements and responsibilities established by applicable state/federal law as well as charter agreements. This section reports the school's overall performance in the 2022-2023 school year based on measures relevant to organizational health and performance. A complete evaluation of the charter performance framework indicators identified in the Operations/Organizational section is forthcoming.

Educational Program

Charter Terms	
Compliance with Education Requirements	Meets Standards
Students with Disabilities Rights	Meets Standards
English Language Learners Rights	Meets Standards

Financial Management and Oversight

Financial Management and Compliance	Pending
Generally Accepted Accounting Principles	Pending

Governance and Reporting

Governance Requirements	Meets Standard
Accountability of Management	Meets Standard
Reporting Requirements	Meets Standard

Students and Employees

Rights of Students	Meets Standard
Credentialing	Does Not Meet Standard
Employment Rights	Meets Standard
Background Checks	Meets Standard

School Environment

Facilities and Transportation	Meets Standard
Health and Safety	Meets Standard
Information Handling	Meets Standard

Additional Obligations

Other Obligations	Meets Standard

LEAD Academy HS

Academics: Pursuant to T.C.A § 49-13-102, two of the purposes of a charter school are to improve learning for all students and to ensure that children have the opportunity to reach proficiency on state academic assessments. In addition, the law states that “[t]he performance-related provisions within a charter agreement shall be based on a performance framework that clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the authorizer's evaluation of each public charter school.” The academic performance framework is made up of three key areas. Student Achievement (50%) Comparative Performance (30%) and School Culture (20%).

Overall Achievement Metrics

Sub-Category	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
	Points Total		1	2	3	4	
Absolute Achievement	Absolute performance in ELA, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in math, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in science, as measured by Tennessee State Assessments - Percent of students scoring On Track/Mastered	All	Less than 40%	40%-49.9%	50%-70%	Greater than 70%	8.3%
Growth	TVAAS overall composite index	All	Level 1	Level 2	Level 3	Level 4 & 5	20%
Chronic Absenteeism	The percent of students missing 10 percent or more of enrolled school days	HS	Greater than 30%	20.1-30%	10.1%-20%	10% or less	5%
		K-8	Greater than 20%	13.1%-20%	6.1%-13%	6% or less	

Comparative Performance Metrics

Measure	Description		Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
2a	School comparative performance to authorizing district average in ELA	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2b	School comparative performance to authorizing district average in math	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2c	School comparative performance to authorizing district average in science	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2d	School comparative performance to authorizing district average in social studies	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%

School Culture Metrics

Measure	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
3a	Suspension rate	ES	5% or more	4%-4.9%	3%-3.9%	Less than 3%	5%
		MS	20% or more	13%-19.9%	5%-12.9%	Less than 5%	
		HS	10% or more	8%-9.9%	4%-7.9%	Less than 4%	
3b	Student attrition rate	All	35% or more	25%-34.9%	15%-24.9%	Less than 15%	5%
3c	Teacher retention rate	All	Less than 65%	65%-74.9%	75%-84.9%	85% or more	5%
3d	Student attendance rate	All	Less than 90%	90%-93.9%	94%-96.9%	97% or more	5%

Academic	2022-2023	Rating
ELA	23%	2
Math	10%	1
Science	33%	1
Social Studies	30%	NA
Growth	4	4
Chronic Absenteeism	20.9%	2
Overall Achievement ()		1.2
ELA	-9%	2
Math	-3%	3
Science	6%	4
Social Studies	12%	4
Comparative Performance ()		1.0
Suspension Rate	9.1%	2
Student Attrition Rate	12.03%	4
Teacher Retention Rate	89.5%	4
Student Attendance Rate	93.2%	2
School Culture ()		0.60
Overall APF	2.8	

Rating	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard
Points	1	2	3	4

Financials: The following financial data is pending for the 2023 Annual Financial Report. The data from the reports were used to reflect each charter school's financial health and sustainability. The ratings will be based on and align with the 2023 Performance Framework, Section II Near Term Indicators and Sustainability indicators. Any indicator missing a standard rating will be updated in the Spring of 2024 based on the charter school's submission of the Annual Financial Report.

LEAD Academy HS		
Section II Financial Performance		
Indicators and Measures	Outcomes:	Standards:
Near Term Indicators:		
1(a) Current Ratio		
1(b) Unrestricted Days Cash		
1(c) Enrollment Variance	98%	Meets Standard
1(d) Debt Default		
Sustainability Indicators:		
2(a) Total Margin		
2(b) Debt to Asset Ratio		
2(c) Cash Flow		
2(d) Debt Service Coverage Ratio		

Operations: Charter schools are required to meet certain regulatory requirements and responsibilities established by applicable state/federal law as well as charter agreements. This section reports the school's overall performance in the 2022-2023 school year based on measures relevant to organizational health and performance. A complete evaluation of the charter performance framework indicators identified in the Operations/Organizational section is forthcoming.

Educational Program

Charter Terms	
Compliance with Education Requirements	Meets Standards
Students with Disabilities Rights	Meets Standards
English Language Learners Rights	Meets Standards

Financial Management and Oversight

Financial Management and Compliance	Pending
Generally Accepted Accounting Principles	Pending

Governance and Reporting

Governance Requirements	Meets Standard
Accountability of Management	Meets Standard
Reporting Requirements	Meets Standard

Students and Employees

Rights of Students	Meets Standard
Credentialing	Does Not Meet Standard
Employment Rights	Meets Standard
Background Checks	Meets Standard

School Environment

Facilities and Transportation	Meets Standard
Health and Safety	Meets Standard
Information Handling	Meets Standard

Additional Obligations

Other Obligations	Meets Standard

LEAD Prep Southeast

Academics: Pursuant to T.C.A § 49-13-102, two of the purposes of a charter school are to improve learning for all students and to ensure that children have the opportunity to reach proficiency on state academic assessments. In addition, the law states that “[t]he performance-related provisions within a charter agreement shall be based on a performance framework that clearly sets forth the academic and operational performance indicators, measures, and metrics that will guide the authorizer's evaluation of each public charter school.” The academic performance framework is made up of three key areas. Student Achievement (50%) Comparative Performance (30%) and School Culture (20%).

Overall Achievement Metrics

Sub-Category	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
Points Total			1	2	3	4	
Absolute Achievement	Absolute performance in ELA, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in math, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in science, as measured by Tennessee State Assessments - Percent of students scoring On Track/Mastered	All	Less than 40%	40%-49.9%	50%-70%	Greater than 70%	8.3%
Growth	TVAAS overall composite index	All	Level 1	Level 2	Level 3	Level 4 & 5	20%
Chronic Absenteeism	The percent of students missing 10 percent or more of enrolled school days	HS	Greater than 30%	20.1-30%	10.1%-20%	10% or less	5%
		K-8	Greater than 20%	13.1%-20%	6.1%-13%	6% or less	

Comparative Performance Metrics

Measure	Description		Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
2a	School comparative performance to authorizing district average in ELA	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2b	School comparative performance to authorizing district average in math	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2c	School comparative performance to authorizing district average in science	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2d	School comparative performance to authorizing district average in social studies	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%

School Culture Metrics

Measure	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
3a	Suspension rate	ES	5% or more	4%-4.9%	3%-3.9%	Less than 3%	5%
		MS	20% or more	13%-19.9%	5%-12.9%	Less than 5%	
		HS	10% or more	8%-9.9%	4%-7.9%	Less than 4%	
3b	Student attrition rate	All	35% or more	25%-34.9%	15%-24.9%	Less than 15%	5%
3c	Teacher retention rate	All	Less than 65%	65%-74.9%	75%-84.9%	85% or more	5%
3d	Student attendance rate	All	Less than 90%	90%-93.9%	94%-96.9%	97% or more	5%

Academic	2022-2023	Rating
ELA	23%	2
Math	21%	2
Science	40%	2
Social Studies	35%	NA
Growth	5	4
Chronic Absenteeism	18%	3
Overall Achievement ()		1.4
ELA	-4%	3
Math	1%	3
Science	12%	4
Social Studies	7%	4
Comparative Performance ()		1.1
Suspension Rate	8.4%	2
Student Attrition Rate	6.2%	4
Teacher Retention Rate	84%	3
Student Attendance Rate	93.8%	2
School Culture ()		0.55
Overall APF	3.05	

Rating	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard
Points	1	2	3	4

Financials: The following financial data is pending for the 2023 Annual Financial Report. The data from the reports were used to reflect each charter school's financial health and sustainability. The ratings will be based on and align with the 2023 Performance Framework,

Section II Near Term Indicators and Sustainability indicators. Any indicator missing a standard rating will be updated in the Spring of 2024 based on the charter school's submission of the Annual Financial Report.

LEAD Prep Southeast		
Section II Financial Performance		
Indicators and Measures	Outcomes:	Standards:
Near Term Indicators:		
1(a) Current Ratio		
1(b) Unrestricted Days Cash		
1(c) Enrollment Variance	99%	Meets Standard
1(d) Debt Default		
Sustainability Indicators:		
2(a) Total Margin		
2(b) Debt to Asset Ratio		
2(c) Cash Flow		
2(d) Debt Service Coverage Ratio		

Operations: Charter schools are required to meet certain regulatory requirements and responsibilities established by applicable state/federal law as well as charter agreements. This section reports the school's overall performance in the 2022-2023 school year based on measures relevant to organizational health and performance. A complete evaluation of the charter performance framework indicators identified in the Operations/Organizational section is forthcoming.

Educational Program

Charter Terms	
Compliance with Education Requirements	Meets Standards
Students with Disabilities Rights	Meets Standards
English Language Learners Rights	Meets Standards

Financial Management and Oversight

Financial Management and Compliance	Pending
Generally Accepted Accounting Principles	Pending

Governance and Reporting

Governance Requirements	Meets Standard
Accountability of Management	Meets Standard
Reporting Requirements	Meets Standard

Students and Employees

Rights of Students	Meets Standard
Credentialing	Does Not Meet Standard
Employment Rights	Meets Standard
Background Checks	Meets Standard

School Environment

Facilities and Transportation	Meets Standard
Health and Safety	Meets Standard
Information Handling	Meets Standard

Additional Obligations

Other Obligations	Meets Standard



School Name	LEAD Brick Church
Address	2835 Brick Church Pike Nashville, TN 37207
Phone	(615) 815-1264
Website	www.leadpublicschools.org
School Leader	Kathryn Rice McKinzie
School Mission	LEAD Public Schools prepares all our students with the skills and knowledge they need to be ready for college and life.
Operating Status	OPEN
Year Opened	2012-2013
Grades Served in 2021-2022	5-8
Enrollment in 2021-2022	227
Contracted Services	n/a
Approved Waivers	n/a



LEAD Brick Church SPF Report

Academic Composite			
Metric	Performance	Score	Rating
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR: 5.7%	5	Approaching
School Progress: Progress on Components of R-SSR	Highest Subject TVAAS: 5 (Math)	30	Exceeding
Student Progress: Composite TVAAS	TVAAS: 5	30	Exceeding
Equity: Progress on Components of SSR	Decrease the number of students scoring Below or Approaching by 10%: 16.2%	10	Exceeding
CompositeScore		75/85= 88%	
Overall Category Rating		Meeting	
* is classified as a [K-8/high] school for the purpose of calculating campus academic composite scores.			

Student & Family Rights		
Metric	Performance	Metric Rating
Access: Right to Special Services	Brick Church did not experience challenges with the identification, enrollment, or servicing of students in special populations (ESL, Homeless, Foster Care, Migrant).	Meeting
Enrollment: Right to School Choice & Equitable Environment	ASD has verified the school's application processes comply with all state and local requirements, <u>AND</u> ASD has received no complaints or statements of concern indicating that the school's systems foster inequitable school offerings.	Meeting
Health/Safety	All immunizations were submitted. ASD has received no complaints or statements of concern indicating that the school presents a risk to the health or safety of students, staff, or families.	Meeting



Leadership: Right to Qualified Staff	All school faculty and administrators meet state and district standards for certification.	Meeting
Voice: Right to be Included/Informed	ASD has observed practices at the school that demonstrate active engagement with families & community stakeholders.	Meeting
Overall Category Rating		Meeting

Finance		
Metric	Performance	Metric Rating
30 Days Cash on Hand	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
Threshold Ratio	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
Financial Audit	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
Overall Category Rating		Pending Submission of Final Audit

ASD Quarter 1 SPF Report

CMO: LEAD

School: Brick Church

Executive Director: Dwayne Tucker

SY21-22 SPF Progress

Academic Composite Score-Category*			
Metric	Performance	Score	Rating
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR: 6.9%	5/10	Meeting <i>→ apped?</i> Approaching
School Progress: Progress on Components of R-SSR	Highest Subject TVAAS: 5 (Math)	30	Exceeding
Student Progress: Composite TVAAS	TVAAS: 5	30	Exceeding
Equity: Progress on Components of SSR	Decrease the number of students scoring Below or Approaching by 10%: 16.2%	10	Exceeding
Academic Composite Score		75/85 = 88% <i>94%</i>	
Overall Category Rating		Meeting	

* is classified as a [K-8/high] school for the purpose of calculating campus academic composite scores.

*↳ w/ new %
does this change?*
Quarter 1 Academic Progress
Benchmark Data *<1As>*

Grade	Subject	Below Expectations	Approaching Expectations	Meets Expectations	Exceeds Expectations
5	ELA	64.7%	29.4%	5.9%	0.0%
	Math	66.7%	27.8%	5.6%	0.0%
6	ELA	60.9%	29.0%	10.1%	0.0%
	Math	68.6%	30.0%	1.4%	0.0%
7	ELA	48.0%	44.0%	8.0%	0.0%
	Math	76.5%	23.5%	0.0%	0.0%
8	ELA	53.9%	36.8%	9.2%	0.0%
	Math	80.3%	17.1%	1.3%	1.3%



* Respond to these

Reflections

1. What instructional practices and organizational conditions have helped and/or hindered achievement and desired results for student learning in Quarter 1?
2. What school-wide and grade-level strategies held the highest leverage for academic achievement in Quarter 1? Moving forward, how will you replicate these strategies to increase achievement?
3. After reviewing the current data, what short-term goals will be implemented immediately to course-correct student achievement?
4. What milestones can the CMO/school show as evidence of progress during this quarter?

ASD Quarter 1 SPF Report

CMO: LEAD

School: Neely's Bend

Executive Director: Dwayne Tucker

SY21-22 SPF Progress

Academic Composite Score-Category*			
Metric	Performance	Score	Rating
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR: 12.6%	15	Exceeding
School Progress: Progress on Components of R-SSR	Highest Subject TVAAS: 5 (Math)	30	Exceeding
Student Progress: Composite TVAAS	TVAAS: 5	30	Exceeding
Equity: Progress on Components of SSR	Decrease the number of students scoring Below or Approaching by 10%: 9.5	3	Approaching
Academic Composite Score		78/85 = 91%	
Overall Category Rating		Exceeding	
* is classified as a [K-8/high] school for the purpose of calculating campus academic composite scores.			

Quarter 1 Academic Progress

Benchmark Data

Grade	Subject	Below Expectations	Approaching Expectations	Meets Expectations	Exceeds Expectations
5	ELA	80.0%	13.3%	6.7%	0.0%
	Math	56.3%	37.5%	6.3%	0.0%
6	ELA	54.2%	32.5%	13.3%	0.0%
	Math	69.4%	23.4%	7.3%	0.0%
7	ELA	52.9%	34.3%	12.7%	0.0%
	Math	67.9%	23.9%	8.3%	0.0%
8	ELA	49.5%	45.2%	4.3%	1.1%
	Math	73.4%	20.2%	6.4%	0.0%

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Academic Composite Rubric

The metrics in this category are measured at the school level and ensure equitable student opportunities and increased performance outcomes.

Category	Description	Exceeding	Meeting	Approaching	Does Not Meet
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR $\geq$ 6% OR Annual Measurable Objective (AMO) <i>Better of</i>	SSR of $\geq$ 7% or exceeded AMO	Met SSR of 6% or met AMO	SSR of 5%-4% or AMO not met	SSR $\leq$ 3% or AMO not met
		15 points	10 points	5 points	0 points
School Progress: Progress on Components of R-SSR	Progress on Components of Reward School Success Rate (R-SSR/Subject TVAAS)	TVAAS 4 or 5	TVAAS 3	TVAAS 2	TVAAS 1
		30 points (3-8) 20 points (HS)	20 points (3-8) 10 points (HS)	10 points (3-8) 5 points (HS)	0 points (3-8) 0 points (HS)
Student Progress: Composite TVAAS	- Level 1: Significantly Below Expectations - Level 2: Below Expectations - Level 3: At Expectations - Level 4: Above Expectations - Level 5: Significantly Above Expectations	Level 4 or 5	Level 3	Level 2	Level 1
		30 points (3-8) 20 points (HS)	20 points (3-8) 10 points (HS)	10 points (3-8) 5 points (HS)	0 points (3-8) 0 points (HS)
Equity: Progress on Components of SSR	Target: Decrease the number of students scoring Below or Approaching by 10% in all applicable subgroups.	$\geq$ 11% decrease	10% decrease	7% - 9% decrease	$\leq$ 6% decrease
		10 points	7 points	3 points	0 points
College & Career	Graduation Rate Gains Target: 10 pt gains or Y1: $\geq$ 5th; Y2: $\geq$ 10th; Y3: $\geq$ 25th; Y4: $\geq$ 40th; Y5: $\geq$ 50th	$\geq$ 11 points or Y1: $\geq$ 10th; Y2: $\geq$ 25th; Y3: $\geq$ 40th; Y4: $\geq$ 50th; Y5: $\geq$ 60th	10 points or Y1: $\geq$ 5th; Y2: $\geq$ 10th; Y3: $\geq$ 25th; Y4: $\geq$ 40th; Y5: $\geq$ 50th	5-6 points or Y1: $\geq$ 4th; Y02: $\geq$ 5th; Y3: $\geq$ 10th; Y4: $\geq$ 25th; Y5: $\geq$ 40th	$\leq$ 4 points or Y1: <4th; Y2: <5th; Y3: <10th; Y4: <25th; Y5: <40th
		10 points	7 points	3 points	0 points
	Avg. ACT Score Target: 14+	$\geq$ 16 avg. score	14-15 avg. score	12-13 avg. score	$\leq$ 11 avg. score
		10 points	7 points	3 points	0 points



School Name	LEAD Neely's Bend
Address	1251 Neely's Bend Rd. Madison, TN 37115
Phone	(615) 645-6461
Website	www.leadpublicschools.org/schools/neelys-bend/
School Leader	Dominique Torres
School Mission	LEAD Public Schools prepares all our students with the skills and knowledge they need to be ready for college and life.
Operating Status	OPEN
Year Opened	2015-2016
Grades Served in 2021-2022	5-8
Enrollment in 2021-2022	368
Contracted Services	n/a
Approved Waivers	n/a



LEAD Neely's Bend SPF Report

Academic Composite			
Metric	Performance	Score	Rating
Mission: Reward School Success Rate (R-SSR) Percentile Rank	R-SSR: 10.3%	15	Exceeding
School Progress: Progress on Components of R-SSR	Highest Subject TVAAS: 5 (Math)	30	Exceeding
Student Progress: Composite TVAAS	TVAAS: 5	30	Exceeding
Equity: Progress on Components of SSR	Decrease the number of students scoring Below or Approaching by 10%: 9.5	3	Approaching
CompositeScore		78/85 = 91%	
Overall Category Rating		Exceeding	
* is classified as a [K-8/high] school for the purpose of calculating campus academic composite scores.			

Student & Family Rights		
Metric	Performance	Metric Rating
Access: Right to Special Services	Neely's Bend did not experience challenges with the identification, enrollment, or servicing of students in special populations (ESL, Homeless, Foster Care, Migrant).	Meeting
Enrollment: Right to School Choice & Equitable Environment	ASD has verified the school's application processes comply with all state and local requirements, <u>AND</u> ASD has received no complaints or statements of concern indicating that the school's systems foster inequitable school offerings.	Meeting
Health/Safety	All immunizations were submitted. ASD has received no complaints or statements of concern indicating that the school presents a risk to the health or safety of students, staff, or families.	Meeting

Leadership: Right to Qualified Staff	All school faculty and administrators meet state and district standards for certification.	Meeting
Voice: Right to be Included/Informed	ASD has observed practices at the school that demonstrates active engagement with families & community stakeholders.	Meeting
Overall Category Rating		Meeting

Finance		
Metric	Performance	Metric Rating
30 Days Cash on Hand	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
Threshold Ratio	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
Financial Audit	There was no audit available from FY22 to conduct the review.	Pending Submission of Final Audit
Overall Category Rating		Pending Submission of Final Audit

LEAD Academy FY 2021-2022

Indicators and Measures		
Section II Financial Performance		
1. Near Term Indicators:	Outcome	Standard
A. Current Ratio	13.84798257	Meets Standard
B. Unrestricted Days Cash	147.28	Meets Standard
C. Enrollment Variance	89%	Does not Meet Standard
D. Default	not in default	Meets Standard
2. Sustainability Indicators:	Outcome	Standard
A. Total Margin		
1. Current year Income to Revenue	6.04	Meets Standard
2. Aggregated Total Margin-three yr. ^ in Net Position	7.07	Meets Standard
B. Debt to Asset Ratio	0.07036	Meets Standard
C. Cash Flow		
1. Multi Year Cash Flow	4,073,304	Meets Standard
2. Most recent year cash flow	2,590,824	Meets Standard
D. Debt Service Coverage Ratio*	9.89528067	Meets Standard
Section III. Organization Performance	Outcome	Standard
2. Financial Management Oversight		
2(a) Financial Reporting and Compliance Requirements	Meeting Financial reporting and compliance	Meets Standard
2(b) GAAP	Following GAAP	Meets Standard
3. Governance and Reporting		
3(c) Financial Reporting	Complying to reporting requirements	Meets Standard

LEAD Cameron FY 2021-2022

Indicators and Measures		
Section II Financial Performance		
1. Near Term Indicators:	Outcome	Standard
A. Current Ratio	22.04662893	Meets Standard
B. Unrestricted Days Cash	366.63	Meets Standard
C. Enrollment Variance	94%	Does not Meet Standard
D. Default	not in default	Meets Standard
2. Sustainability Indicators:	Outcome	Standard
A. Total Margin		
1. Current year Income to Revenue	6.51	Meets Standard
2. Aggregated Total Margin-three yr. ^ in Net Position	2.56	Meets Standard
B. Debt to Asset Ratio	0.04476197318	Meets Standard
C. Cash Flow		
1. Multi Year Cash Flow	6,381,233	Meets Standard
2. Most recent year cash flow	3,410,138	Meets Standard
D. Debt Service Coverage Ratio*	9.89528067	Meets Standard
Section III. Organization Performance	Outcome	Standard
2. Financial Management Oversight		
2(a) Financial Reporting and Compliance	Meeting Financial reporting and compliance	Meets Standard
2(b) GAAP	Following GAAP	Meets Standard
3. Governance and Reporting		
3(c) Financial Reporting	Complying to reporting requirements	Meets Standard

LEAD SE HS FY 2021-2022

Indicators and Measures		
Section II Financial Performance		
1. Near Term Indicators:	Outcome	Standard
A. Current Ratio	8.689323018	Meets Standard
B. Unrestricted Days Cash	257.84	Meets Standard
C. Enrollment Variance	93%	Does not meet standard
D. Default	not in default	Meets Standard
2. Sustainability Indicators:	Outcome	Standard
A. Total Margin		Meets Standard
1. Current year Income to Revenue	8.01	Meets Standard
2. Aggregated Total Margin-three yr. ^ in Net Position	6.23	Meets Standard
B. Debt to Asset Ratio	0.112145	Meets Standard
C. Cash Flow		
1. Multi Year Cash Flow	12,627,831	Meets Standard
2. Most recent year cash flow	4,023,587	Meets Standard
D. Debt Service Coverage Ratio*	9.89528067	Meets Standard
Section III. Organization Performance		
2. Financial Management Oversight		
2(a) Financial Reporting and Compliance R	Meeting Financial reporting and compliance	Meets Standard
2(b) GAAP	Following GAAP	Meets Standard
3. Governance and Reporting		
3{c} Financial Reporting	Complying to reporting requirements	Meets Standard

Criteria/Comments:

Meets Standard- Current Ratio is greater than or equal to 1.1

Days Cash is greater than or equal to 60 days

Does not meet standard if ADM to Budget Variance between 85 percent or equal to 95 percent

School is not in default of loan covenant(s) and/or is not delinquent with debt service payments

Positive most recent year

Aggregated Total Margin-three yr. ^ in Net Position

Debt to Asset Ratio is less than or equal to 0.9

Multi year cash flow is positive

Most recent year cash flow is positive

Debt Service Coverage Ratio is greater than or equal to 1.1

Is the school meeting financial reporting and compliance requirements?

Is the school following GAAP as outlined in GASB?

Is the school complying with reporting requirements?

Cameron College Prep Annual Performance Framework SY 2020-2021

1034 First Avenue South
Nashville, TN 37210

Contact Information:

Kate Ring

Principal

kate.ring@leadpublicschools.org

Office: 615-806-6320

Open and Operating

Demographics	2020-21
African American:	22%
Hispanic:	71%
White:	6%
Asian:	1%
ED:	52%
SWD:	11%
EL:	44%

Annual Performance Framework Ratings SY 2020-2021

Exceeds the Standard
Meets the Standard
Does Not Meet the Standard
Falls Far Below Standard

Academics: As a result of disruptions to the 2020-21 school year caused by the COVID-19 public health emergency, the Tennessee State Legislature passed the Accountability Hold Harmless Act. This legislation removes negative consequences associated with evaluation and accountability for the 2020-21 school year. As a result, assessment scores for the 2020-21 school year are included for reporting purposes only and shall not be used to inform negative consequences against the school. No overall rating is provided for any MNPS charter school.

Overall Achievement Metrics

Sub-Category	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
	Points Total		1	2	3	4	
Absolute Achievement	Absolute performance in ELA, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in math, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in science, as measured by Tennessee State Assessments - Percent of students scoring On Track/Mastered	All	Less than 40%	40%-49.9%	50%-70%	Greater than 70%	8.3%
Growth	TVAAS overall composite index	All	Level 1	Level 2	Level 3	Level 4 & 5	20%
Chronic Absenteeism	The percent of students missing 10 percent or more of enrolled school days	HS	Greater than 30%	20.1-30%	10.1%-20%	10% or less	5%
		K-8	Greater than 20%	13.1%-20%	6.1%-13%	6% or less	

Comparative Performance Metrics

Measure	Description		Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
2a	School comparative performance to authorizing district average in ELA	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2b	School comparative performance to authorizing district average in math	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2c	School comparative performance to authorizing district average in science	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2d	School comparative performance to authorizing district average in social studies	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%

School Culture Metrics

Measure	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
3a	Suspension rate	ES	5% or more	4%-4.9%	3%-3.9%	Less than 3%	5%
		MS	20% or more	13%-19.9%	5%-12.9%	Less than 5%	
		HS	10% or more	8%-9.9%	4%-7.9%	Less than 4%	
3b	Student attrition rate	All	35% or more	25%-34.9%	15%-24.9%	Less than 15%	5%
3c	Teacher retention rate	All	Less than 65%	65%-74.9%	75%-84.9%	85% or more	5%
3d	Student attendance rate	All	Less than 90%	90%-93.9%	94%-96.9%	97% or more	5%

Rating	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard
Points	1	2	3	4

Academic	2020-2021	Rating
ELA Proficiency	8.8%	1
Math Proficiency	5.3%	1
Science Proficiency	17.2%	1
Social Studies Proficiency	16.3	N/A
Growth (TVAAS)	2	2
Chronic Absenteeism	41.7%	1
Overall Achievement (50%)		0.7
ELA	7.5% Below MNPS	2
Math	6.3% Below MNPS	2
Science	2.2% Below MNPS	2
Social Studies	4.2% below MNPS	2
Comparative Performance (30%)		0.6
Suspension Rate	3%	4
Student Attrition Rate	14%	4
Teacher Retention Rate	77%	3
Student Attendance Rate	88%	1
School Culture (20%)		0.6
Overall APF	N/A	

Financials

Annually, a charter school will be rated on the following near term and sustainability indicators. Any school that receives a "Falls Far Below" rating in any category may receive an immediate Plan of Correction to assist in remedying the deficiencies in this financial area. Three or more successive years of ratings that include a measure in the "Falls Far Below" category may result in a recommendation of immediate revocation of the charter.

Indicators and Measures		
Section II Financial Performance		
1. Near Term Indicators:	Outcome	Standard
A. Current Ratio	31.73835558	Meets Standard
B. Unrestricted Days Cash*	212.7266143	Meets Standard
C. Enrollment Variance	94%	Does not meet standard
D. Default	not in default	Falls Far Below Standard
2. Sustainability Indicators:	Outcome	Standard
A. Total Margin		
1. Current year Income to Revenue	2.420284	Meets Standard
2. Aggregated Total Margin-three yr. ^ in Net Position	2.419769	Meets Standard
B. Debt to Asset Ratio	0.031507619	Meets Standard
C. Cash Flow*		
1. Multi Year Cash Flow	12,627,831	Meets Standard
2. Most recent year cash flow	8,413,937	Meets Standard
D. Debt Service Coverage Ratio*	4.396652	Meets Standard

Operations

Charter schools are required to meet certain regulatory requirements and responsibilities established by applicable state/federal law as well as charter agreements. This section reports the school's overall performance in the 2020-2021 school year based on measures relevant to organizational health and performance.

Educational Program

Charter Terms	Meets Standards
Compliance with Education Requirements	Meets Standards
Students with Disabilities Rights	Meets Standards
English Language Learners Rights	Meets Standards

Financial Management and Oversight

Financial Management and Compliance	Meets Standards
Generally Accepted Accounting Principles	Meets Standards

Governance and Reporting

Governance Requirements	Meets Standard
Accountability of Management	Meets Standard
Reporting Requirements	Meets Standard

Students and Employees

Rights of Students	Meets Standard
Credentialing	Meets Standard
Employment Rights	Meets Standard
Background Checks	Meets Standard

School Environment

Facilities and Transportation	Meets Standard
Health and Safety	Meets Standard
Information Handling	Meets Standard

Additional Obligations

Other Obligations	Meets Standard

LEAD Academy HS Annual Performance Framework SY 2020-2021

531 Metroplex Drive
Nashville, TN 37211

Contact Information:

Nic Frank

Principal

nic.frank@leadpublicschools.org

Office: 615-798-0543

Open and Operating

Demographics	2020-21
African American:	18%
Hispanic:	48%
White:	27%
Asian:	7%
ED:	36%
SWD:	9%
EL:	25%

Annual Performance Framework Ratings SY 2020-2021

Exceeds the Standard
Meets the Standard
Does Not Meet the Standard
Falls Far Below Standard

Academics: As a result of disruptions to the 2020-21 school year caused by the COVID-19 public health emergency, the Tennessee State Legislature passed the Accountability Hold Harmless Act. This legislation removes negative consequences associated with evaluation and accountability for the 2020-21 school year. As a result, assessment scores for the 2020-21 school year are included for reporting purposes only and shall not be used to inform negative consequences against the school. No overall rating is provided for any MNPS charter school.

Overall Achievement Metrics

Sub-Category	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
Points Total			1	2	3	4	
Absolute Achievement	Absolute performance in ELA, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in math, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in science, as measured by Tennessee State Assessments - Percent of students scoring On Track/Mastered	All	Less than 40%	40%-49.9%	50%-70%	Greater than 70%	8.3%
Growth	TVAAS overall composite index	All	Level 1	Level 2	Level 3	Level 4 & 5	20%
Chronic Absenteeism	The percent of students missing 10 percent or more of enrolled school days	HS	Greater than 30%	20.1-30%	10.1%-20%	10% or less	5%
		K-8	Greater than 20%	13.1%-20%	6.1%-13%	6% or less	

Comparative Performance Metrics

Measure	Description		Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
2a	School comparative performance to authorizing district average in ELA	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2b	School comparative performance to authorizing district average in math	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2c	School comparative performance to authorizing district average in science	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2d	School comparative performance to authorizing district average in social studies	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%

School Culture Metrics

Measure	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
3a	Suspension rate	ES	5% or more	4%-4.9%	3%-3.9%	Less than 3%	5%
		MS	20% or more	13%-19.9%	5%-12.9%	Less than 5%	
		HS	10% or more	8%-9.9%	4%-7.9%	Less than 4%	
3b	Student attrition rate	All	35% or more	25%-34.9%	15%-24.9%	Less than 15%	5%
3c	Teacher retention rate	All	Less than 65%	65%-74.9%	75%-84.9%	85% or more	5%
3d	Student attendance rate	All	Less than 90%	90%-93.9%	94%-96.9%	97% or more	5%

Rating Points	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard
	1	2	3	4

Academic	2020-2021	Rating
ELA	15.8%	1
Math	Below 5%	1
Science	13.6%	1
Social Studies	Below 5%	N/A
Growth	1	1
Chronic Absenteeism	32.1%	1
Overall Achievement (50%)		0.5
ELA	8.8% Below MNPS	2
Math	3.9% Below MNPS	3
Science	13% Below MNPS	2
Social Studies	10.7% Below MNPS	2
Comparative Performance (30%)		0.7
Suspension Rate	0.4%	4
Student Attrition Rate	No Data	N/A
Teacher Retention Rate	85%	4
Student Attendance Rate	91%	2
School Culture (20%)		0.6
Overall APF	N/A	

Financials

Annually, a charter school will be rated on the following near term and sustainability indicators. Any school that receives a "Falls Far Below" rating in any category will receive an immediate Plan of Correction to assist in remedying the deficiencies in this financial area. Three or more successive years of ratings that include a measure in the "Falls Far Below" category may result in a recommendation of immediate revocation of the charter.

Indicators and Measures		
Section II Financial Performance		
1. Near Term Indicators:	Outcome	Standard
A. Current Ratio	8.985600493	Meets Standard
B. Unrestricted Days Cash*	212.7266143	Meets Standard
C. Enrollment Variance	101%	Meets Standard
D. Default	not in default	Falls Far Below Standard
2. Sustainability Indicators:	Outcome	Standard
A. Total Margin		
1. Current year Income to Revenue	3.59	Meets Standard
2. Aggregated Total Margin-three yr. ^ in Net Position	2.420284	Meets Standard
B. Debt to Asset Ratio	0.111289168	Meets Standard
C. Cash Flow*		
1. Multi Year Cash Flow	12,627,831	Meets Standard
2. Most recent year cash flow	8,413,937	Meets Standard
D. Debt Service Coverage Ratio*	4.396652	Meets Standard

Operations

Charter schools are required to meet certain regulatory requirements and responsibilities established by applicable state/federal law as well as charter agreements. This section reports the school's overall performance in the 2020-2021 school year based on measures relevant to organizational health and performance.

Educational Program

Charter Terms	Meets Standards
Compliance with Education Requirements	Meets Standards
Students with Disabilities Rights	Meets Standards
English Language Learners Rights	Meets Standards

Financial Management and Oversight

Financial Management and Compliance	Meets Standards
Generally Accepted Accounting Principles	Meets Standards

Governance and Reporting

Governance Requirements	Meets Standard
Accountability of Management	Meets Standards
Reporting Requirements	Meets Standards

Students and Employees

Rights of Students	Meets Standards
Credentialing	Meets Standards
Employment Rights	Meets Standards
Background Checks	Meets Standards

School Environment

Facilities and Transportation	Meets Standards
Health and Safety	Meets Standards
Information Handling	Meets Standards

Additional Obligations

Other Obligations	Meets Standards

LEAD Prep Southeast Annual Performance Framework SY 2020-2021

531 Metroplex Drive
Nashville, TN 37211

Contact Information:

Emma Mac

Principal

emma.mac@leadpublicschools.org

Office: 615-798-0543

Open and Operating

Demographics	2020-21
African American:	18%
Hispanic:	48%
White:	27%
Asian:	7%
ED:	36%
SWD:	9%
EL:	25%

Annual Performance Framework Ratings SY 2020-2021

Exceeds the Standard
Meets the Standard
Does Not Meet the Standard
Falls Far Below Standard

Academics: As a result of disruptions to the 2020-21 school year caused by the COVID-19 public health emergency, the Tennessee State Legislature passed the Accountability Hold Harmless Act. This legislation removes negative consequences associated with evaluation and accountability for the 2020-21 school year. As a result, assessment scores for the 2020-21 school year are included for reporting purposes only and shall not be used to inform negative consequences against the school. No overall rating is provided for any MNPS charter school.

Overall Achievement Metrics

Sub-Category	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
Points Total			1	2	3	4	
Absolute Achievement	Absolute performance in ELA, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in math, as measured by Tennessee state assessments - Percent of students scoring On Track/Mastered	All	Less than 20%	20%-34.9%	35%-49.9%	50% or more	8.3%
	Absolute performance in science, as measured by Tennessee State Assessments - Percent of students scoring On Track/Mastered	All	Less than 40%	40%-49.9%	50%-70%	Greater than 70%	8.3%
Growth	TVAAS overall composite index	All	Level 1	Level 2	Level 3	Level 4 & 5	20%
Chronic Absenteeism	The percent of students missing 10 percent or more of enrolled school days	HS	Greater than 30%	20.1-30%	10.1%-20%	10% or less	5%
		K-8	Greater than 20%	13.1%-20%	6.1%-13%	6% or less	

Comparative Performance Metrics

Measure	Description		Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
2a	School comparative performance to authorizing district average in ELA	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2b	School comparative performance to authorizing district average in math	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2c	School comparative performance to authorizing district average in science	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%
2d	School comparative performance to authorizing district average in social studies	All Grades	More than 15 percentage points lower than the authorizing district	5.1-15 percentage points lower than the authorizing district	Up to 5 percentage points below or above the authorizing district	Greater than 5 percentage points higher than the authorizing district	7.5%

School Culture Metrics

Measure	Description	Grade Level	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard	Total Weight
3a	Suspension rate	ES	5% or more	4%-4.9%	3%-3.9%	Less than 3%	5%
		MS	20% or more	13%-19.9%	5%-12.9%	Less than 5%	
		HS	10% or more	8%-9.9%	4%-7.9%	Less than 4%	
3b	Student attrition rate	All	35% or more	25%-34.9%	15%-24.9%	Less than 15%	5%
3c	Teacher retention rate	All	Less than 65%	65%-74.9%	75%-84.9%	85% or more	5%
3d	Student attendance rate	All	Less than 90%	90%-93.9%	94%-96.9%	97% or more	5%

Rating	Falls Far Below Standard	Does Not Meet Standard	Meets Standard	Exceeds Standard
Points	1	2	3	4

Academic	2020-2021	Rating
ELA	14.9%	1
Math	11.6%	1
Science	19.4%	1
Social Studies	22.2%	N/A
Growth	1	1
Chronic Absenteeism	7.2%	4
Overall Achievement (50%)		0.6
ELA	3.8% Below MNPS	3
Math	1.2% Above MNPS	3
Science	1.2% Below MNPS	3
Social Studies	2.8% Above MNPS	3
Comparative Performance (30%)		0.9
Suspension Rate	1.1%	4
Student Attrition Rate	5%	4
Teacher Retention Rate	92%	4
Student Attendance Rate	97%	4
School Culture (20%)		0.8
Overall APF		N/A

Financials

Annually, a charter school will be rated on the following near term and sustainability indicators. Any school that receives a "Falls Far Below" rating in any category will receive an immediate Plan of Correction to assist in remedying the deficiencies in this financial area. Three or more successive years of ratings that include a measure in the "Falls Far Below" category may result in a recommendation of immediate revocation of the charter.

Indicators and Measures		
Section II Financial Performance		
1. Near Term Indicators:	Outcome	Standard
A. Current Ratio	9.458935227	Meets Standard
B. Unrestricted Days Cash*	212.7266143	Meets Standard
C. Enrollment Variance	93%	Does not meet standard
D. Default	not in default	Meets Standard
2. Sustainability Indicators:	Outcome	Standard
A. Total Margin		Meets Standard
1. Current year Income to Revenue	4.231243	Meets Standard
2. Aggregated Total Margin-three yr. ^ in Net Position	6.971232	Meets Standard
B. Debt to Asset Ratio	0.10572015	Meets Standard
C. Cash Flow*		
1. Multi Year Cash Flow	12,627,831	Meets Standard
2. Most recent year cash flow	8,413,937	Meets Standard
D. Debt Service Coverage Ratio*	4.396652	Meets Standard

Operations

Charter schools are required to meet certain regulatory requirements and responsibilities established by applicable state/federal law as well as charter agreements. This section reports the school's overall performance in the 2020-2021 school year based on measures relevant to organizational health and performance.

Educational Program

Charter Terms	Meets Standards
Compliance with Education Requirements	Meets Standards
Students with Disabilities Rights	Meets Standards
English Language Learners Rights	Meets Standards

Financial Management and Oversight

Financial Management and Compliance	Meets Standards
Generally Accepted Accounting Principles	Meets Standards

Governance and Reporting

Governance Requirements	Meets Standard
Accountability of Management	Meets Standard
Reporting Requirements	Meets Standard

Students and Employees

Rights of Students	Meets Standard
Credentialing	Meets Standard
Employment Rights	Meets Standard
Background Checks	Meets Standard

School Environment

Facilities and Transportation	Meets Standard
Health and Safety	Meets Standard
Information Handling	Meets Standard

Additional Obligations

Other Obligations	Meets Standard

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

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INDEPENDENT AUDITORS' REPORT

The Board of Directors
LEAD Public Schools, Inc. and Affiliates
Nashville, Tennessee

Report on the Financial Statements

Opinion

We have audited the accompanying consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (the "Organization") (a nonprofit organization), which comprise the consolidated statement of financial position as of June 30, 2023, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of LEAD Public Schools, Inc. and Affiliates as of June 30, 2023, and the changes in their net assets and their cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Prior Period Financial Statements

The financial statements of the Organization as of June 30, 2022, were audited by other auditors whose report dated March 30, 2022, expressed an unmodified opinion on those statements.

Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in Government Auditing Standards issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Consolidated Financial Statements section of our report. We are required to be independent of LEAD Public Schools, Inc. and Affiliates and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error. In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for a period of one year subsequent to the date of the consolidated financial statements.

Auditor's Responsibilities for the Audit of the Consolidated Financial Statements

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and, therefore, is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users made on the basis of these consolidated financial statements.

In performing an audit in accordance with generally accepted auditing standards and Government Auditing Standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audits.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.

- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about LEAD Public Schools, Inc. and Affiliates' ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated December XX, 2023, on our consideration of the Organization's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.

Nashville, Tennessee
December XX, 2023

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

ASSETS	2023	2022
Current assets:		
Cash and cash equivalents	\$ 21,594,309	\$ 11,085,693
Accounts receivable	5,005,336	11,516,319
Prepaid expenses and other	412,523	498,074
Total current assets	27,012,168	23,100,086
Right-of-use asset - operating lease	3,559,486	4,099,576
Property and equipment, net	8,444,307	7,535,108
Total assets	\$ 39,015,961	\$ 34,734,770
LIABILITIES AND NET ASSETS		
Current liabilities:		
Accounts payable	\$ 1,350,515	\$ 1,341,312
Accrued expenses	2,314,168	1,888,714
Operating lease liabilities, current portion	653,062	635,322
Total current liabilities	4,317,745	3,865,348
Operating lease liabilities, noncurrent portion	3,290,127	3,718,878
Total liabilities	7,607,872	7,584,226
Net assets:		
Without donor restriction	31,148,089	27,150,544
With donor restriction	260,000	-
Total net assets	31,408,089	27,150,544
Total liabilities and net assets	\$ 39,015,961	\$ 34,734,770

See accompanying notes to financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2023

	Without Donor Restrictions	With Donor Restrictions	Total
Public support and revenue:			
District funding	\$ 36,490,342	\$ -	\$ 36,490,342
Federal grants	10,183,638	-	10,183,638
Contributions and other	1,608,383	260,000	1,868,383
Interest income	311,563	-	311,563
Total public support and revenue	48,593,926	260,000	48,853,926
Expenses:			
Student instruction and services	40,553,445	-	40,553,445
Administration	3,684,630	-	3,684,630
Fundraising	358,306	-	358,306
Total expenses	44,596,381	-	44,596,381
Change in net assets	3,997,545	260,000	4,257,545
Net assets, beginning of year	27,150,544	-	27,150,544
Net assets, end of year	\$ 31,148,089	\$ 260,000	\$ 31,408,089

See accompanying notes to financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Public support and revenue:			
District funding	\$ 38,968,491	\$ -	\$ 38,968,491
Federal grants	12,180,680	-	12,180,680
Contributions and other	766,762	373,500	1,140,262
Interest income	35,401	-	35,401
Net assets released from restrictions	418,500	(418,500)	-
	<u>52,369,834</u>	<u>(45,000)</u>	<u>52,324,834</u>
Total public support and revenue			
Expenses:			
Student instruction and services	37,758,851	-	37,758,851
Administration	2,853,890	-	2,853,890
Fundraising	370,637	-	370,637
	<u>40,983,378</u>	<u>-</u>	<u>40,983,378</u>
Total expenses			
Change in net assets	11,386,456	(45,000)	11,341,456
Net assets, beginning of year	15,764,088	45,000	15,809,088
	<u>15,764,088</u>	<u>45,000</u>	<u>15,809,088</u>
Net assets, end of year	<u>\$ 27,150,544</u>	<u>\$ -</u>	<u>\$ 27,150,544</u>

See accompanying notes to financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES
YEAR ENDED JUNE 30, 2023

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 27,002,054	\$ 1,931,395	\$ 265,295	\$ 29,198,744
Occupancy	3,343,824	102,131	-	3,445,955
Professional and service fees	1,775,005	779,560	-	2,554,565
Transportation	2,951,213	-	-	2,951,213
Depreciation	1,441,350	64,299	-	1,505,649
Instructional	1,705,234	115,611	-	1,820,845
Office supplies and equipment	690,154	24,189	-	714,343
Organizational development	863,884	266,477	-	1,130,361
Authorizer fees	-	325,982	-	325,982
Athletic cost	473,765	-	-	473,765
Outreach	103,957	-	-	103,957
Miscellaneous	203,005	74,986	-	277,991
Loss on disposal of assets	-	-	-	-
Staff development	-	-	93,011	93,011
Total expenses	<u>\$ 40,553,445</u>	<u>\$ 3,684,630</u>	<u>\$ 358,306</u>	<u>\$ 44,596,381</u>

See accompanying notes to financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES
YEAR ENDED JUNE 30, 2022

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 24,721,647	\$ 1,333,937	\$ 314,096	\$ 26,369,680
Occupancy	3,627,880	109,244	2,317	3,739,441
Professional and service fees	1,994,659	591,561	-	2,586,220
Transportation	2,942,908	42,256	-	2,985,164
Depreciation	1,369,981	10,592	-	1,380,573
Instructional	1,011,321	56,491	7,995	1,075,807
Office supplies and equipment	833,252	36,478	-	869,730
Organizational development	278,942	190,921	-	469,863
Authorizer fees	-	323,401	-	323,401
Interest cost	258,749	-	-	258,749
Athletic cost	297,280	-	-	297,280
Outreach	102,638	-	-	102,638
Miscellaneous	225,752	159,009	-	384,761
Loss on disposal of assets	93,842	-	-	93,842
Staff development	-	-	46,229	46,229
Total expenses	<u>\$ 37,758,851</u>	<u>\$ 2,853,890</u>	<u>\$ 370,637</u>	<u>\$ 40,983,378</u>

See accompanying notes to financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF CASH FLOWS
YEAR ENDED JUNE 30, 2023

	<u>2023</u>	<u>2022</u>
Cash flows from operating activities:		
Change in net assets	\$ 4,257,545	\$ 11,341,456
Adjustments to reconcile change in net assets to net cash flows from operating activities		
Depreciation	1,505,649	1,380,573
Loss on disposal of assets	-	93,842
Noncash lease expense	540,090	254,624
Changes in operating assets and liabilities:		
Accounts receivable	6,510,983	(8,135,331)
Prepaid expenses and other	85,551	(417,263)
Accounts payable	9,203	276,224
Accrued expenses	425,454	567,597
Net cash flows provided by operating activities	<u>13,334,475</u>	<u>5,361,722</u>
Cash flows from investing activities		
Purchase of property and equipment	<u>(2,414,848)</u>	<u>(877,001)</u>
Net cash flows used in investing activities	<u>(2,414,848)</u>	<u>(877,001)</u>
Cash flows from financing activities:		
Payments on operating lease	(411,011)	-
Payments on note payable	<u>-</u>	<u>(5,837,961)</u>
Net cash flows used in financing activities	<u>(411,011)</u>	<u>(5,837,961)</u>
Net change in cash and cash equivalents	10,508,616	(1,353,240)
Cash and cash equivalents, beginning of year	11,085,693	12,438,933
Cash and cash equivalents, end of year	<u><u>\$ 21,594,309</u></u>	<u><u>\$ 11,085,693</u></u>
Supplemental disclosure of cash flow information:		
Cash paid during the year for interest	<u><u>\$ -</u></u>	<u><u>\$ 258,749</u></u>

See accompanying notes to financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

A. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization

LEAD Public Schools, Inc. (“LPS”) was incorporated during 2010 as a charter management organization that starts and operates public charter schools in Middle Tennessee. Public charter schools in Tennessee are public schools operated under a charter contract with a local district, statewide district, or the state board of education, and governed under a nonprofit Board of Directors separate from the district. Currently, LPS operates five charter schools as single member limited liability corporations consisting of LEAD Academy, Nonprofit, LLC (the “Academy”); Cameron College Prep, Nonprofit, LLC (“Cameron”); Brick Church College Prep, Nonprofit, LLC (“Brick Church”); LEAD Prep Southeast, Nonprofit, LLC (“Southeast”); and Neely’s Bend College Prep, Nonprofit, LLC (“Neely’s Bend”). In addition, LPS operates a real estate holding company, LEAD Real Estate Holdings, Nonprofit, LLC (“LEAD Real Estate”).

Academy, Cameron, Brick Church, Southeast, and Neely’s Bend were organized in accordance with Section 6(1)(a) of the Tennessee Public Charter School Act of 2002 (the “Act”). Pursuant to the Act, public charter schools are part of the state’s public education program offering an alternative means within the public school system for accomplishing necessary outcomes of education. Academy entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on July 23, 2006 to operate a charter school in Nashville, Tennessee. Academy began classes in July 2007 with fifth and sixth grade classes. Academy began classes in July 2007 with fifth and sixth grade classes and has since transitioned to serving ninth through twelfth grades. Cameron entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 1, 2010, to operate a charter school in Nashville, Tennessee. Cameron began classes in August 2011 with fifth grade and has since added a grade each year through the eighth grade. Brick Church entered into a Charter School Agreement with the Tennessee Achievement School District (“ASD”) on June 1, 2012 to operate a charter school in Nashville, Tennessee. Brick Church began classes in August 2012 with fifth grade and has since added a grade each year through the eighth grade. Southeast entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 25, 2011, to operate a charter school in Nashville, Tennessee. Southeast began classes in August 2013 and currently enrolls students from fifth grade through the twelfth grade. Neely’s Bend entered into a Charter School Agreement with the Tennessee Achievement School District on May 21, 2015, to operate a charter school in Madison, Tennessee. Neely’s Bend began classes in August 2015 with fifth grade and has since added a grade each year through the eighth grade.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

A. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - Continued

In accordance with the charter agreements of Academy, Cameron, and Southeast enrollment is open to any student within the Metropolitan Nashville Public Schools (“MNPS”) System who resides in Davidson County. Brick Church and Neely’s Bend enrollment is restricted to students who would have been zoned to Brick Church Middle School, Neely’s Bend Middle School, respectively, or other ASD Priority School. If space exists after planned enrollment of zoned students, other eligible students may enroll or be included in an enrollment lottery pursuant to T.C.A. Section 49-13-106. Academy currently enrolls students in grades nine through twelve. Academy’s charter provides for a total enrollment of 458. Cameron currently enrolls students in grades five through nine. Cameron’s charter provides for a total enrollment of 627. Brick Church currently enrolls students in grades five through nine. Brick Church’s charter provides for a total enrollment of 275. Southeast currently enrolls students in grades five through twelve. Southeast’s charter provides for a total enrollment of 805. Neely’s Bend currently enrolls students in grades five through nine. Neely’s Bend’s charter provides for a total enrollment of 465.

Basis of Presentation

The accompanying consolidated financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America (“U.S. GAAP”). The consolidated financial statements present the financial position and results of operations of LPS, the Academy, Cameron, Brick Church, Southeast, Neely’s Bend, and LEAD Real Estate (collectively, the “Organization”).

The Organization presents its consolidated financial statements in accordance with Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”) guidance for not-for-profit organizations. Under this guidance, net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restriction – Net assets that are not subject to donor-imposed stipulations. All contributions are considered available for general use unless specifically restricted by the donor.

Net Assets With Donor Restriction – Net assets subject to donor-imposed stipulations that may or will be met, either by actions of the Organization and/or the passage of time. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restriction and reported in the statements of activities as net assets released from restriction. If a restriction is fulfilled in the same time period in which the contribution is received, the support is reported as increases to net assets without donor restriction. Additionally, some net assets are subject to a donor-imposed stipulation that they be held in perpetuity by the Organization. There were no net assets that were required to be held in perpetuity at June 30, 2023.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

A. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - Continued

Use of Estimates

The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements, and the reported amounts of revenues and expenses and allocation of functional expenses during the reporting period. Actual results could differ from those estimates.

Cash and Cash Equivalents

For purposes of the consolidated statements of cash flows, the Organization considers all highly liquid investments with original maturities when purchased of less than three months to be cash equivalents. The cash accounts are held primarily by financial institutions and at times may exceed amounts that are federally insured.

Accounts Receivable

Accounts receivable represent amounts due from grants or other sources which have been approved but not received. Management considers all accounts collectible and, therefore, an allowance for doubtful accounts has not been recognized in the consolidated financial statements.

Property and Equipment

Property and equipment are recorded at acquisition cost less accumulated depreciation, if purchased, or the fair value on the date received, if donated. The cost of routine maintenance and repairs is expensed as incurred. Expenditures which materially extend the economic lives, change capacities, or improve the efficiency of the related assets are capitalized. Upon sale or retirement, the cost and related accumulated depreciation are removed from the respective accounts, and the resulting gain or loss, if any, is included in the consolidated statement of activities. Depreciation is provided using the straight-line method over the estimated useful lives of the assets, ranging from three to seven years, or over the term of the lease for leasehold improvements, if less.

Donated Materials, Services, and Assets

Donated materials and services, if any, are reflected as contributions in the accompanying consolidated financial statements at their estimated values at the date of receipt. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation and are recorded at their fair values in the period received.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

A. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - Continued

Donations of property and equipment are recorded as support at their estimated fair value. Such donations are reported as net assets without donor restriction unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restriction. Absent donor stipulations regarding how long those donated assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Organization reclassifies net assets with donor restriction to net assets without donor restriction at that time.

Contributions

Contributions and unconditional promises to give are recognized as revenue when made or a written promise to give is conveyed, whichever is earliest. Contributions of assets other than cash are recorded at estimated fair value at the date of donation. Contributions received with donor stipulations that restrict the use of the assets and promises to give that have time or purpose restrictions are reported as revenue with donor restrictions. When the use or time restriction is met, the amount is reported as revenue without donor restrictions and a reduction in revenue with donor restrictions. The Organization recognizes contributions when cash, securities, or other assets or an unconditional promise to give is received. Conditional promises to give – that is, those with a measurable performance or other barrier and a right of return – are not recognized until the conditions on which they depend have been met. At June 30, 2023, the Organization did not have any conditional promises to give.

Grants

The Organization receives federal financial assistance through state agencies. The expenditure of funds received under these programs generally requires compliance with terms and conditions specified in the grant agreements and are subject to audit by the grantor agencies.

Functional Allocation of Expenses

The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. While most costs have been directly assigned to a functional category, certain joint costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis. Expenses that are allocated consist primarily of salaries and wages which are allocated based on time and effort.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

A. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - Continued

Income Taxes

The Organization is exempt from federal income taxes under the provisions of Internal Revenue Code Section 501(c)(3) and, accordingly, no provision for income taxes is included in the consolidated financial statements.

The Organization follows FASB ASC guidance clarifying the accounting for uncertainty in income taxes recognized in an entity's financial statements. This guidance prescribes a minimum probability threshold that a tax position must meet before a financial statement benefit is recognized. The minimum threshold is defined as a tax position that is more likely than not to be sustained upon examination by the applicable taxing authority, including resolution of any related appeals or litigation processes, based on the technical merits of the position. The tax benefit to be recognized is measured as the largest amount of benefit that is greater than 50% likely of being realized upon ultimate settlement. The Organization has no tax penalties or interest reported in the accompanying consolidated financial statements.

B. LIQUIDITY AND AVAILABILITY OF RESOURCES

The Organization regularly monitors liquidity required to meet its operating needs and other contractual commitments. For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Organization considers all expenditures related to its ongoing program service activities as well as the conduct of services undertaken to support those activities to be general expenditures. The Organization maintains a line of credit with maximum borrowings of \$1,000,000 (see Note E) with a financial institution that is drawn upon during the year to manage cash flow, if needed. Financial assets available for general expenditure, that is, without donor restriction or other restrictions limiting their use within one year of the statement of financial position, comprise the following at June 30, 2023:

	<u>2023</u>	<u>2022</u>
Financial assets:		
Cash and cash equivalents	\$21,594,309	\$11,085,693
Accounts receivable	<u>5,005,336</u>	<u>11,516,319</u>
	26,599,645	22,602,012
Less amounts not available to be used for General expenditures within one year	<u>-</u>	<u>-</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$26,599,645</u>	<u>\$22,602,012</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

C. PROPERTY AND EQUIPMENT

Property and equipment consists of the following at June 30, 2023:

	<u>2023</u>	<u>2022</u>
Land	\$ 542,960	\$ 542,960
Buildings and improvements	9,286,330	8,688,103
Computer equipment	3,887,141	2,794,355
Furniture and fixtures	301,392	299,319
Office equipment	143,176	119,281
Leasehold improvements	<u>2,305,716</u>	<u>1,607,868</u>
	16,466,715	14,051,886
Less accumulated depreciation	<u>(8,022,408)</u>	<u>(6,516,778)</u>
	<u>\$ 8,444,307</u>	<u>\$ 7,535,108</u>

Depreciation expense totaled \$1,505,649 and \$1,380,573 for the years ended June 30, 2023 and 2022, respectively.

D. LEASES

The Organization leases building space for school related activities. The Organization determines whether a contract contains a lease at inception by determining if the contract conveys the right to control the use of identified property, plant, or equipment for a period of time in exchange for consideration. The Organization has elected to account for lease and non-lease components as a single component.

Right-of-use ("ROU") assets and lease liabilities are recognized at the commencement date based on the present value of the future minimum lease payments over the lease term. Renewal and termination clauses that are factored into the determination of the lease term if it is reasonably certain these options would be exercised by the Organization. Lease assets are amortized over the lease term unless there is a transfer of title or purchase option reasonably certain of exercise, in which case the asset life is used. Certain of the Organization's lease agreements include variable payments. Variable lease payments not dependent on an index or rate primarily consist of common area maintenance charges and are not included in the calculation of the ROU asset and lease liability and are expensed as incurred. In order to determine the present value of lease payments, the Organization uses the implicit rate when it is readily determinable. As most of the Organization's leases do not provide an implicit rate, management uses the Organization's incremental borrowing rate based on the information available at lease commencement to determine the present value of lease payments.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

D. LEASES - Continued

The Organization's lease agreements do not contain any material residual value guarantees or material restrictive covenants. The Organization does not have leases where it is involved with the construction or design of an underlying asset. The Organization has no material obligation for leases signed but not yet commenced as of June 30, 2023. The Organization does not have any sublease activities.

The Organization has elected the practical expedient not to recognize leases with terms of 12 months or less on the statement of financial position and instead recognize the lease payments on a straight-line basis over the term of the lease and variable lease payments in the period in which the obligation for the payments is incurred. Therefore, the Organization's short-term lease expense for the period does not reflect our ongoing short-term lease commitments. Lease expense for such short-term leases was not material for the year ended June 30, 2023.

As of June 30, 2023, future minimum operating lease payments required are as follows:

Year Ending June 30,

2024	\$ 653,062
2025	671,308
2026	550,013
2027	566,514
2028	583,509
Thereafter	<u>1,851,460</u>
Total lease payments	4,875,866
Less present value discount	<u>(932,677)</u>
Present value of lease liabilities	<u>\$ 3,943,189</u>

Required supplemental information relating to our leases for the year ended June 30, 2023 is as follows:

Operating:	
Operating leases, included in operating expenses	\$ 635,322
Short-term leases, included in operating expenses	<u>-</u>
Net operating lease cost	<u>\$635,322</u>
Lease Term and Discount Rate: (in years)	
Weighted average remaining lease term - operating leases	7.61
Weighted average discount rate - operating	5.50%

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

E. LINE-OF-CREDIT

The Organization's line of credit has a \$1,000,000 maximum availability and requires interest-only payments in monthly installments at the bank's prime rate plus half a point, with minimum rate of 4.5% until maturity in May 2025 at which time all outstanding principal and interest will be due. There was no balance outstanding on the line of credit as of June 30, 2023 or 2022.

F. FEDERAL GRANTS

The Organization receives federal pass-through funding from various grantor agencies to help meet objectives and accomplish its mission as a charter school. Total federal awards received during the years ended June 30, 2023 and 2022 totaled \$10,183,638 and \$12,180,680, respectively.

G. CONCENTRATIONS

For the years ended June 30, 2023 and 2022, the Organization received \$36,490,342 (72%) and \$38,968,491 (74%), respectively, of its funding for operations from MNPS and ASD based on the state of Tennessee's Basic Education Program ("BEP"). BEP funding is designated to schools based on student enrollment.

H. RETIREMENT PLAN

Teacher Legacy Pension Plan of TCRS

Plan Description

The Tennessee Consolidated Retirement System ("TCRS") was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies ("LEA") after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

H. RETIREMENT PLAN - Continued

Teacher Retirement Plan of TCRS

Benefits Provided

Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with five years of service credit or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service related disability eligibility. The service related and non-service related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments ("COLA") after retirement.

A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the consumer price index ("CPI") during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest.

Contributions

Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions for the Teacher Legacy Pension Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2023 and 2022, to the Teacher Legacy Pension Plan were \$163,617 and \$222,215, respectively, which is 8.69% and 10.63% of covered payroll, respectively. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

H. RETIREMENT PLAN - Continued

Plan Description

Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with five years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic COLAs after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the CPI during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

Contributions

Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer-contribution rate cannot be less than 4%, except for in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions for the Teacher Retirement Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES INTERNAL SCHOOL FUNDS
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2023 AND 2022

H. RETIREMENT PLAN - Continued

Employer contributions by the Organization for the years ended June 30, 2023 and 2022, to the Teacher Retirement were \$366,196 and \$173,991, respectively, which is 4.00% of covered payroll for both years. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Members of the Teacher Retirement Plan are also included in a 401(k) component whereby employer contributions are made at 5% of covered payroll. Employer contributions by the Organization for the years ended June 30, 2023 and 2022, were \$366,196 and \$173,991, respectively

Other Plan

The Organization's noncertified employees are covered under a 403(b) plan. Under terms of the plan, employee contributions are matched 200% up to a maximum match of 6% of eligible compensation by the Organization.

Employer contributions for all retirement plans totaled \$156,607 and \$1,007,316 for the years ended June 30, 2023 and 2022, respectively.

I. SUBSEQUENT EVENTS

The Organization evaluated subsequent events through December XX, 2023, the date these consolidated financial statements were available to be issued, and determined there were no events requiring disclosure.

**LEAD PUBLIC SCHOOLS, INC.
AND AFFILIATES**

**CONSOLIDATED FINANCIAL STATEMENTS
AND SUPPLEMENTAL INFORMATION**

As of and for the Year Ended June 30, 2019

And Report of Independent Auditor

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

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Report of Independent Auditor

To the Board of Directors
LEAD Public Schools, Inc. and Affiliates
Nashville, Tennessee

Report on the Consolidated Financial Statements

We have audited the accompanying consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statement of financial position as of June 30, 2019, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to consolidated financial statements.

Management's Responsibility for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of LEAD Public Schools, Inc. and Affiliates as of June 30, 2019, and the changes in their net assets and their cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matters

Other Information

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and it is not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated December 9, 2019, on our consideration of LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting and compliance.

Adoption of New Accounting Pronouncement

As discussed in Note 1 to the consolidated financial statements, LEAD Public Schools, Inc. and Affiliates adopted Accounting Standards Update 2016-14, *Not-for-Profit Entities* (Topic 958): *Presentation of Financial Statements of Not-for-Profit Entities*. Our opinion is not modified with respect to this matter.



Nashville, Tennessee
December 9, 2019

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FINANCIAL POSITION

JUNE 30, 2019

ASSETS

Current Assets:

Cash and cash equivalents	\$ 5,377,123
Accounts receivable	1,537,316
Prepaid expenses and other	<u>460,062</u>
Total Current Assets	7,374,501

Property and equipment, net	7,578,171
Construction in progress	<u>330,000</u>
Total Assets	<u>\$ 15,282,672</u>

LIABILITIES AND NET ASSETS

Current Liabilities:

Accounts payable	\$ 362,035
Accrued expenses	1,674,869
Other current liabilities	127,304
Notes payable, current portion	<u>150,693</u>
Total Current Liabilities	2,314,901

Notes payable, noncurrent portion	<u>5,707,885</u>
Total Liabilities	8,022,786

Net Assets:

Without donor restriction	6,859,886
With donor restriction	<u>400,000</u>
Total Net Assets	<u>7,259,886</u>
Total Liabilities and Net Assets	<u>\$ 15,282,672</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2019

	Without Donor Restriction	With Donor Restriction	Total
Public Support and Revenue:			
District funding	\$ 27,216,687	\$ -	\$ 27,216,687
Federal grants	2,990,447	-	2,990,447
Contributions and other	1,062,921	400,000	1,462,921
Net assets released from restrictions	-	-	-
Total Public Support and Revenue	31,270,055	400,000	31,670,055
Expenses:			
Student instruction and services	27,901,797	-	27,901,797
Administration	2,811,576	-	2,811,576
Fundraising	192,472	-	192,472
Total Expenses	30,905,845	-	30,905,845
Change in net assets	364,210	400,000	764,210
Net assets, beginning of year	6,495,676	-	6,495,676
Net assets, end of year	<u>\$ 6,859,886</u>	<u>\$ 400,000</u>	<u>\$ 7,259,886</u>

The accompanying notes to the consolidated financial statements are an integral part of this statement.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2019

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 18,179,598	\$ 1,291,171	\$ 117,232	\$ 19,588,001
Transportation	2,698,364	12,441	51	2,710,856
Occupancy	2,574,475	79,667	-	2,654,142
Professional and service fees	1,044,770	578,277	18,040	1,641,087
Depreciation	1,005,652	120,507	-	1,126,159
Instructional	789,408	156,974	2,228	948,610
Office expense	695,301	24,341	560	720,202
Organizational development	173,073	148,708	8,114	329,895
Authorizer fees	-	320,247	-	320,247
Athletics	281,650	-	-	281,650
Interest	255,193	-	-	255,193
Other expenses	158,897	71,228	991	231,116
Outreach	45,416	8,015	-	53,431
Development expense	-	-	45,256	45,256
Total Expenses	<u>\$ 27,901,797</u>	<u>\$ 2,811,576</u>	<u>\$ 192,472</u>	<u>\$ 30,905,845</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

CONSOLIDATED STATEMENT OF CASH FLOWS

YEAR ENDED JUNE 30, 2019

Cash flows from operating activities:

Change in net assets	\$ 764,210
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
Depreciation and amortization	1,126,159
Changes in operating assets and liabilities:	
Accounts receivable	591,840
Prepaid expenses and other	(166,846)
Accounts payable	162,055
Accrued expenses	621,051
Other liabilities	127,304
Net cash provided by operating activities	<u>3,225,773</u>

Cash flows from investing activities:

Purchase of property and equipment	<u>(964,674)</u>
Net cash used in investing activities	<u>(964,674)</u>

Cash flows from financing activities:

Proceeds from notes payable	38,480
Payments on note payable	<u>(371,563)</u>
Net cash used in financing activities	<u>(333,083)</u>

Net increase in cash and cash equivalents	1,928,016
Cash and cash equivalents at beginning of year	<u>3,449,107</u>
Cash and cash equivalents at end of year	<u>\$ 5,377,123</u>

Supplemental disclosure of cash flow information:

Cash paid during the year for interest	<u>\$ 255,193</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2019*

Note 1—Nature of operations and summary of significant accounting policies

LEAD Public Schools, Inc. ("LPS") was incorporated during 2010 as a charter management organization that starts and operates public charter schools in Middle Tennessee. Public charter schools in Tennessee are public schools operated under a charter contract with a local district, statewide district, or the state board of education and governed under a nonprofit board of directors separate from the district. Currently, LPS operates five charter schools as single member limited liability corporations consisting of LEAD Academy, Nonprofit, LLC (the "Academy"); Cameron College Prep, Nonprofit, LLC ("Cameron"); Brick Church College Prep, Nonprofit, LLC ("Brick Church"); LEAD Prep Southeast, Nonprofit, LLC ("Southeast"); and Neely's Bend College Prep, Nonprofit, LLC ("Neely's Bend"). In addition, LPS operates a real estate holding company, LEAD Real Estate Holdings, Nonprofit, LLC ("LEAD Real Estate").

The Academy, Cameron, Brick Church, Southeast, and Neely's Bend were organized in accordance with Section 6(1)(a) of the Tennessee Public Charter School Act of 2002 (the "Act"). Pursuant to the Act, public charter schools are part of the state's public education program offering an alternative means within the public school system for accomplishing necessary outcomes of education. The Academy entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on July 23, 2006, to operate a charter school in Nashville, Tennessee. The Academy began classes in July 2007 with fifth and sixth grade classes. The Academy has since added a grade each year until it reached twelfth grade. Cameron entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 1, 2010, to operate a charter school in Nashville, Tennessee. Cameron began classes in August 2011 with fifth grade and has since added a grade each year through the eighth grade. Brick Church entered into a Charter School Agreement with the Tennessee Achievement School District ("ASD") on June 1, 2012, to operate a charter school in Nashville, Tennessee. Brick Church began classes in August 2012 with fifth grade and has since added a grade each year through the eighth grade. Southeast entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 25, 2011, to operate a charter school in Nashville, Tennessee. Southeast began classes in August 2013 with fifth grade and plans to add a grade each subsequent year through the twelfth grade. Neely's Bend entered into a Charter School Agreement with the Tennessee Achievement School District on May 21, 2015, to operate a charter school in Madison, Tennessee. Neely's Bend began classes in August 2015 with fifth grade and has since added a grade each year through the eighth grade.

In accordance with the Academy's, Cameron's, and Southeast's charter agreements, enrollment is open to any student within the Metropolitan Nashville Public Schools ("MNPS") System who resides in Davidson County. Brick Church and Neely's Bend enrollment is restricted to students who would have been zoned to Brick Church Middle School, Neely's Bend Middle School, respectively, or other ASD Priority School. If space exists after planned enrollment of zoned students, other eligible students may enroll or be included in an enrollment lottery pursuant to T.C.A. Section 49-13-106. The Academy currently enrolls students in grades nine through twelve. The Academy's charter provides for a total enrollment of 800. Cameron currently enrolls students in grades five through eight. Brick Church currently enrolls students in grades five through eight. Southeast currently enrolls students in grades five through ten. Neely's Bend currently enrolls students in grades five through eight.

Basis of Presentation – The accompanying consolidated financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America ("U.S. GAAP"). The consolidated financial statements present the financial position and results of operations of LPS, the Academy, Cameron, Brick Church, Southeast, Neely's Bend, and LEAD Real Estate (collectively the "Organization").

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO CONSOLIDATED FINANCIAL STATEMENTSJUNE 30, 2019

Note 1—Nature of operations and summary of significant accounting policies (continued)

The Organization presents its consolidated financial statements in accordance with Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”) guidance for not-for-profit organizations. Under this guidance, net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restriction – Net assets that are not subject to donor-imposed stipulations. All contributions are considered available for general use unless specifically restricted by the donor.

Net Assets With Donor Restriction – Net assets subject to donor-imposed stipulations that may or will be met, either by actions of the Organization and/or the passage of time. When a restriction expires, net assets with donor restriction are reclassified to net assets without donor restriction and reported in the statements of activities as net assets released from restriction. If a restriction is fulfilled in the same time period in which the contribution is received, the support is reported as increases to net assets without donor restriction. Additionally, some net assets are subject to a donor-imposed stipulation that they be held in perpetuity by the Organization. There were no net assets that were required to be held in perpetuity at June 30, 2019.

Use of Estimates – The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses and allocation of functional expenses during the reporting period. Actual results could differ from those estimates.

Cash and Cash Equivalents – For purposes of the consolidated statement of cash flows, the Organization considers all highly liquid investments with original maturities when purchased of less than three months to be cash equivalents. The cash accounts are held primarily by financial institutions and at times may exceed amounts that are federally insured.

Accounts Receivable – Accounts receivable represent amounts due from grants or other sources which have been approved but not received. All receivables are reported at estimated collectible amounts.

Property and Equipment – Property and equipment are recorded at acquisition cost less accumulated depreciation, if purchased, or the fair value on the date received, if donated. The cost of routine maintenance and repairs is expensed as incurred. Expenditures which materially extend the economic lives, change capacities, or improve the efficiency of the related assets are capitalized. Upon sale or retirement, the cost and related accumulated depreciation are removed from the respective accounts, and the resulting gain or loss, if any, is included in the consolidated statement of activities. Depreciation is provided using the straight-line method over the estimated useful lives of the assets, ranging from three to seven years, or over the term of the lease for leasehold improvements, if less.

Donated Materials, Services, and Assets – Donated materials and services, if any, are reflected as contributions in the accompanying consolidated financial statements at their estimated values at the date of receipt. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation, and are recorded at their fair values in the period received.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2019*

Note 1—Nature of operations and summary of significant accounting policies (continued)

Donations of property and equipment are recorded as support at their estimated fair value. Such donations are reported as net assets without donor restriction unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restriction. Absent donor stipulations regarding how long those donated assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Organization reclassifies net assets with donor restriction to net assets without donor restriction at that time.

Grants – The Organization receives federal financial assistance through state agencies. The expenditure of funds received under these programs generally requires compliance with terms and conditions specified in the grant agreements and are subject to audit by the grantor agencies.

Functional Allocation of Expenses – The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. While most costs have been directly assigned to a functional category, certain joint costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis. Expenses that are allocated consist primarily of salaries and wages which are allocated based on time and effort.

Income Taxes – The Organization is exempt from federal income taxes under the provisions of Internal Revenue Code Section 501(c)(3), and, accordingly, no provision for income taxes is included in the consolidated financial statements.

The Organization follows FASB ASC guidance clarifying the accounting for uncertainty in income taxes recognized in an entity's financial statements. This guidance prescribes a minimum probability threshold that a tax position must meet before a financial statement benefit is recognized. The minimum threshold is defined as a tax position that is more likely than not to be sustained upon examination by the applicable taxing authority, including resolution of any related appeals or litigation processes, based on the technical merits of the position. The tax benefit to be recognized is measured as the largest amount of benefit that is greater than 50% likely of being realized upon ultimate settlement. The Organization has no tax penalties or interest reported in the accompanying consolidated financial statements.

New Accounting Pronouncement – In August 2016, the FASB issued Accounting Standards Update ("ASU") 2016-14, *Not-for-Profit Entities* (Topic 958) – *Presentation of Financial Statements of Not-for-Profit Entities*. The Update addresses the complexity and understandability of net asset classification, deficiencies in information about liquidity and availability of resources, and the lack of consistency in the type of information provided about expenses and investment return. The ASU has been applied retrospectively to all periods presented.

Accounting Policies for Future Pronouncements – In May 2014, the FASB issued ASU 2014-09, *Revenue from Contracts with Customers*. ASU 2014-09 clarifies the principles for recognizing revenue and develops a common revenue standard under U.S. GAAP under which an entity should recognize revenue to depict the transfer of promised goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services. ASU 2014-09 is effective for the Organization for the year ending June 30, 2020. The Organization is currently evaluating the effect of the implementation of this new standard.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

Note 1—Nature of operations and summary of significant accounting policies (continued)

In February 2016, the FASB issued ASU 2016-02, *Leases*. The standard requires all leases with lease terms over 12 months to be capitalized as a right of use asset and lease liability on the statement of financial position at the date of lease commencement. Leases will be classified as either finance or operating. This distinction will be relevant for the pattern of expense recognition in the statement of activities. This standard will be effective for the year ending June 30, 2022. The Organization is currently evaluating the effect of the implementation of this new standard.

In August 2016, the FASB issued ASU 2016-15, *Classification of Certain Cash Receipts and Cash Payments*. This guidance adds or clarifies guidance on the classification of certain cash receipts and payments in the statements of cash flows. This guidance is effective for the year ending June 30, 2020. The Organization is currently evaluating the effect of the implementation of this new standard.

In June 2018, the FASB issued ASU 2018-08, *Not-for-Profit Entities Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made*. The standard provides guidance on determining whether a transaction should be accounted for as a contribution or as an exchange transaction. A primary aspect of this determination is whether the two parties receive and sacrifice commensurate value. The standard also provides guidance on determining whether a contribution is conditional, helping entities better distinguish a donor-imposed condition from a donor-imposed restriction. The standard will be effective for the fiscal year ending June 30, 2020. The Organization is currently evaluating the effect of the implementation of this new standard.

Subsequent Events – The Organization evaluated subsequent events through December 9, 2019, when these consolidated financial statements were available to be issued.

Note 2—Liquidity and availability of resources

The Organization regularly monitors liquidity required to meet its operating needs and other contractual commitments. For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Organization considers all expenditures related to its ongoing program service activities as well as the conduct of services undertaken to support those activities to be general expenditures. The Organization maintains a line of credit with maximum borrowings of \$1,000,000 (see Note 6) with a financial institution that is drawn upon during the year to manage cash flow, if needed. Financial assets available for general expenditure, that is, without donor restriction or other restrictions limiting their use within one year of the statement of financial position, comprise the following at June 30, 2019:

Financial assets:

Cash and cash equivalents	\$ 5,377,123
Accounts receivable	1,537,316
Total financial assets	<u>6,914,439</u>

Less amounts not available to be used for general expenditures within one year

	<u>(400,000)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u><u>\$ 6,514,439</u></u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

Note 3—Property and equipment

Property and equipment consists of the following at June 30, 2019:

Land	\$	542,960
Buildings and improvements		7,319,420
Computer equipment		1,915,783
Furniture and fixtures		398,150
Office equipment		140,283
Textbooks		166,177
Leasehold improvements		1,049,127
School buses		426,284
		<u>11,958,184</u>
Less accumulated depreciation		<u>(4,380,013)</u>
	\$	<u>7,578,171</u>

Depreciation expense totaled \$1,126,159 for the year ended June 30, 2019.

Construction in progress totaling \$330,000 at June 30, 2019 consisted of buildout costs incurred for a new physical education facility at the Organization's Metroplex property.

Note 4—Operating leases

During 2014, Cameron entered into a lease arrangement with MNPS for certain educational facilities starting July 1, 2014 and expires June 30, 2021. The lease requires monthly rent payments of \$31,417 subject to annual increases of 2%. Effective July 1, 2015, this lease was amended permitting the Academy's ninth grade to use a portion of Cameron's leased space. The amendment required monthly rental payments of \$25,957 from Cameron and \$10,347 from the Academy subject to annual increases of 2%. The amendment also gave the Organization the right to terminate the lease subject to 60 days' written notice. Effective July 1, 2017, the lease was amended permitting the Academy's tenth through twelfth grades to use a portion of Cameron's leased space. The amendment requires monthly rental payments of \$21,982 from Cameron and \$23,371 from the Academy subject to annual increases of 2%. Effective July 1, 2018, the lease was amended reducing the monthly rental payment to \$21,468 subject to annual increases of 2%. Under the terms of the lease, rent expense totaled \$257,616 for the year ended June 30, 2019.

As of June 30, 2019, future minimum operating lease payments required are as follows:

<u>Years Ending June 30,</u>		
2020	\$	262,768
2021		<u>268,023</u>
	\$	<u>530,791</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

Note 5—Notes payable

During November 2013, the Organization entered into a loan agreement with CSGF Tennessee, LLC. Under terms of the loan, the Organization received \$100,000 to be used for general support and management of the Organization. The note bears interest at 1.00%. The loan was paid in full during the year ended June 30, 2019.

During July 2015, the Organization entered into a second loan agreement with CSGF Tennessee, LLC. Under terms of the loan, the Organization received \$100,000 to be used for general support and management of the Organization. The note bears interest at 1.00%. The loan was paid in full during the year ended June 30, 2019.

In February 2014, the Organization entered into a note payable with a financial institution for the purchase of certain real estate. During September 2015, this note payable was restructured to a term loan with total borrowings of \$3,900,000 requiring monthly payments of \$24,753 including interest calculated at 4.00%. During July 2017, this term loan was amended to allow additional borrowings of \$2,460,000 and requiring new monthly payments of \$33,363 including interest calculated at 4.25%. Total outstanding amounts plus accrued and unpaid interest are due on July 27, 2022. The agreement is secured by a deed of trust and a negative pledge of the Organization's assets. Amount outstanding under this note totaled \$5,991,661 at June 30, 2019. Additionally, the agreement contains restrictive covenants that are tested annually on June 30. At June 30, 2018, the Organization was in compliance with the other covenants.

Future principal payments on the notes are as follows at June 30, 2019:

Years Ending June 30,

2020	\$150,693
2021	158,002
2022	164,947
2023	5,384,936
	<u>\$ 5,858,578</u>

Note 6—Line of credit

The Organization maintains a line of credit agreement with a financial institution to provide maximum borrowings of \$1,000,000. The line of credit requires monthly interest payments calculated at the bank's prime rate not to fall below 4.5% and matures in April 2020. There were no outstanding amounts under this line of credit as of June 30, 2019.

Note 7—Federal grants

The Organization receives federal pass-through funding from various grantor agencies to help meet objectives and accomplish its mission as a charter school operator. Total federal awards received during the year ended June 30, 2019 totaled \$2,990,447.

Note 8—Concentrations

For the year ended June 30, 2019, the Organization received \$26,966,899 (85%) of its funding for operations from MNPS based on the State of Tennessee's Basic Education Program ("BEP"). BEP funding is designated to schools based on student enrollment.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2019*

Note 9—Retirement plans**Teacher Legacy Pension Plan of TCRS**

Plan Description – The Tennessee Consolidated Retirement System (“TCRS”) was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publically available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost sharing multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies (“LEAs”) after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

Benefits Provided – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with five years of service credit or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member’s highest five consecutive year average compensation and the member’s years of service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service related disability benefits are provided regardless of length of service. Five years of service is required for non-service related disability eligibility. The service related and non-service related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments (“COLA”) after retirement. A COLA is granted each July for annuitants retired prior to the 2nd of July of the previous year. The COLA is based on the change in the consumer price index (“CPI”) during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Legacy Pension Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis.

Contributions – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5% of salary. The LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions for the Teacher Legacy Pension Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2019 to the Teacher Legacy Pension Plan were \$278,518 which is 9.33% of covered payroll. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO CONSOLIDATED FINANCIAL STATEMENTSJUNE 30, 2019

Note 9—Retirement plans (continued)**Teacher Retirement Plan of TCRS**

Plan Description – The TCRS was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publically available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by LEAD: MNPS with memberships in TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost sharing multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies (LEAs) after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

Benefits Provided – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with five years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service related disability benefits are provided regardless of length of service. Five years of service is required for non-service related disability eligibility. The service related and non-service related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic COLAs after retirement. A COLA is granted each July for annuitants retired prior to the 2nd of July of the previous year. The COLA is based on the change in the CPI during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

Contributions – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5% of salary. The LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer contribution rate cannot be less than 4%, except for in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions for the Teacher Retirement Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2019 to the Teacher Retirement Plan were \$184,090 which is 4% of covered payroll. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Members of the Teacher Retirement Plan are also included in a 401(k) component whereby employer contributions are made at 5% of covered payroll.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2019

Note 9—Retirement plans (continued)

Other Plan

The Organization's noncertified employees are covered under a 403(b) plan. Under terms of the plan, employee contributions are matched 200% up to a maximum match of 6% of eligible compensation by the Organization. Employer contributions to this plan totaled \$140,028 for the year ended June 30, 2019.

Employer contributions for all retirement plans totaled \$986,796 for the year ended June 30, 2019.

SUPPLEMENTAL INFORMATION

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES **SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS**

JUNE 30, 2019

Federal Grantor / Program Title	Federal CFDA Number	Pass- Through Entity Identifying Number	Federal Expenditures
U.S. Department of Education - Office of Elementary and Secondary Education:			
Title I Grants to Local Educational Agencies:			
(Passed through Metro Nashville Public Schools)	84.010	N/A	\$ 653,379
(Passed through State of Tennessee Department of Education)	84.010	N/A	1,130,678
Total Title I Grants to Local Educational Agencies			<u>1,784,057</u>
Supporting Effective Instruction State Grants:			
(Passed through Metro Nashville Public Schools)	84.367	N/A	61,700
(Passed through State of Tennessee Department of Education)	84.367	N/A	44,739
Total Supporting Effective Instruction State Grants			<u>106,439</u>
Higher Education Institutional Aid:			
(Passed through Metro Nashville Public Schools)	84.031A	N/A	<u>51,750</u>
Grants for Replication and Expansion of High-Quality Charter Schools			
(Passed through Metro Nashville Public Schools)	84.282M	N/A	360,544
(Passed through State of Tennessee Department of Education)	84.282M	N/A	112,018
Total Grants for Replication and Expansion of High-Quality Charter Schools			<u>472,562</u>
School Safety National Activities			
(Passed through State of Tennessee Department of Education)	84.184Y	N/A	<u>34,770</u>
<u>Special Education Cluster (IDEA):</u>			
Special Education Grants to States:			
(Passed through Metro Nashville Public Schools)	84.027	N/A	325,349
(Passed through State of Tennessee Department of Education)	84.027	N/A	215,520
Total Special Education Grants to States			<u>540,869</u>
Total for Special Education Cluster			<u>540,869</u>
Total U.S. Department of Education - Office of Elementary and Secondary Education			<u>2,990,447</u>
Total Expenditures of Federal Awards			<u>\$ 2,990,447</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

JUNE 30, 2019

Note 1—Basis of presentation

The accompanying schedule of expenditures of federal awards (the “Schedule”) includes the federal award activity of LEAD Public Schools, Inc. and Affiliates under programs of the federal government for the year ended June 30, 2019. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (“Uniform Guidance”). Because the Schedule presents only a selected portion of the operations of LEAD Public Schools, Inc. and Affiliates, it is not intended to and does not present the financial position, changes in net assets, or cash flows of LEAD Public Schools, Inc. and Affiliates.

Note 2—Summary of significant accounting policies

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following, as applicable, either the cost principle in OMB Circular A-122, *Cost Principles for Non-Profit Organization*, or the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.

Note 3—Indirect cost allocation

LEAD Public Schools, Inc. and Affiliates has elected not to use the 10% de minimis indirect cost rate allowed under the Uniform Guidance.

**Report of Independent Auditor on Internal Control over Financial Reporting and on
Compliance and Other Matters Based on an Audit of Financial Statements Performed
in Accordance with *Government Auditing Standards***

To the Board of Directors
LEAD Public Schools, Inc. and Affiliates
Nashville, Tennessee

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statement of financial position as of June 30, 2019, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the consolidated financial statements, and have issued our report thereon dated December 9, 2019.

Internal Control over Financial Reporting

In planning and performing our audit of the consolidated financial statements, we considered LEAD Public Schools, Inc. and Affiliates' internal control over financial reporting ("internal control") to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control. Accordingly, we do not express an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether LEAD Public Schools, Inc. and Affiliates' consolidated financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control or on compliance. The report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliates' internal control and compliance. Accordingly, this communication is not suitable for any other purpose.



Nashville, Tennessee
December 9, 2019

**Report of Independent Auditor on Compliance for Each Major Program
and on Internal Control over Compliance Required by the Uniform Guidance**

To the Board of Directors
LEAD Public Schools, Inc. and Affiliates
Nashville, Tennessee

Report on Compliance for Each Major Federal Program

We have audited LEAD Public Schools, Inc. and Affiliates' compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of LEAD Public Schools, Inc. and Affiliates' major federal programs for the year ended June 30, 2019. LEAD Public Schools, Inc. and Affiliates' major federal programs are identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

Auditor's Responsibility

Our responsibility is to express an opinion on compliance for each of LEAD Public Schools, Inc. and Affiliates' major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about LEAD Public Schools, Inc. and Affiliates' compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of LEAD Public Schools, Inc. and Affiliates' compliance.

Opinion on Each Major Federal Program

In our opinion, LEAD Public Schools, Inc. and Affiliates complied, in all material respects, with the compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2019.

Report on Internal Control over Compliance

Management of LEAD Public Schools, Inc. and Affiliates is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered LEAD Public Schools, Inc. and Affiliates' internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control over compliance.

A deficiency in internal control over compliance exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.



Nashville, Tennessee
December 9, 2019

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
SCHEDULE OF FINDINGS AND QUESTIONED COSTS

YEAR ENDED JUNE 30, 2019

I. Summary of Auditor's Results

1. The auditor's report expresses an unmodified opinion on whether the consolidated financial statements of LEAD Public Schools, Inc. and Affiliates were prepared in accordance with U.S. GAAP.
2. No significant deficiencies relating to the audit of the financial statements are reported in the Report of Independent Auditor on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards*.
3. No instances of noncompliance material to the consolidated financial statements of LEAD Public Schools, Inc. and Affiliates were disclosed during the audit.
4. No significant deficiencies relating to the audit of major federal award programs are reported in the Report of Independent Auditor on Compliance for Each Major Program and on Internal Control over Compliance Required by the Uniform Guidance.
5. The auditor's report on compliance for LEAD Public Schools, Inc. and Affiliates major program listed below expresses an unmodified opinion.
6. Audit findings that are required to be reported in accordance with 3 CFR Section 200.516(a) are reported in this Schedule.
7. The program tested as major program was:

CFDA Number
84.010

Name of Federal Program or Cluster
Title I Grants to Local Educational Agencies

8. The threshold for distinguishing Types A and B programs was \$750,000.
9. LEAD Public Schools, Inc. and Affiliates was determined to be a low-risk auditee.

II. Findings – Financial Statement Audit

None

III. Findings and Questioned Costs – Major Federal Award Programs Audit

None

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS

YEAR ENDED JUNE 30, 2019

None

**LEAD PUBLIC SCHOOLS, INC.
AND AFFILIATES**

CONSOLIDATED FINANCIAL STATEMENTS

As of and for the Years Ended June 30, 2021 and 2020

And Report of Independent Auditor

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

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Report of Independent Auditor

To the Board of Directors
LEAD Public Schools, Inc. and Affiliates
Nashville, Tennessee

Report on the Consolidated Financial Statements

We have audited the accompanying consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statements of financial position as of June 30, 2021 and 2020, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

Management's Responsibility for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of LEAD Public Schools, Inc. and Affiliates as of June 30, 2021 and 2020, and the changes in their net assets and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated December 20, 2021, on our consideration of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and compliance.

Cheryl Behrman LLP

Nashville, Tennessee
December 20, 2021

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

JUNE 30, 2021 AND 2020

	2021	2020
ASSETS		
Current Assets:		
Cash and cash equivalents	\$ 12,438,933	\$ 4,887,232
Accounts receivable	3,380,988	1,476,659
Prepaid expenses and other	80,811	45,698
Total Current Assets	15,900,732	6,409,589
Property and equipment, net	8,132,522	8,205,621
Total Assets	\$ 24,033,254	\$ 14,615,210
LIABILITIES AND NET ASSETS		
Current Liabilities:		
Accounts payable	\$ 1,065,088	\$ 446,081
Accrued expenses	1,321,117	877,063
Notes payable, current portion	164,947	158,002
Total Current Liabilities	2,551,152	1,481,146
Notes payable, noncurrent portion	5,673,014	5,537,960
Total Liabilities	8,224,166	7,019,106
Net Assets:		
Without donor restriction	15,764,088	7,596,104
With donor restriction	45,000	-
Total Net Assets	15,809,088	7,596,104
Total Liabilities and Net Assets	\$ 24,033,254	\$ 14,615,210

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2021

	Without Donor Restriction	With Donor Restriction	Total
Public Support and Revenue:			
District funding	\$ 37,074,425	\$ -	\$ 37,074,425
Federal grants	4,885,320	-	4,885,320
Contributions and other	482,742	300,000	782,742
Net assets released from restrictions	255,000	(255,000)	-
Total Public Support and Revenue	42,697,487	45,000	42,742,487
Expenses:			
Student instruction and services	30,610,836	-	30,610,836
Administration	3,644,565	-	3,644,565
Fundraising	274,102	-	274,102
Total Expenses	34,529,503	-	34,529,503
Change in net assets	8,167,984	45,000	8,212,984
Net assets, beginning of year	7,596,104	-	7,596,104
Net assets, end of year	<u>\$ 15,764,088</u>	<u>\$ 45,000</u>	<u>\$ 15,809,088</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2020

	Without Donor Restriction	With Donor Restriction	Total
Public Support and Revenue:			
District funding	\$ 29,788,783	\$ -	\$ 29,788,783
Federal grants	2,886,114	-	2,886,114
Contributions and other	1,101,824	-	1,101,824
Net assets released from restrictions	400,000	(400,000)	-
Total Public Support and Revenue	34,176,721	(400,000)	33,776,721
Expenses:			
Student instruction and services	29,872,795	-	29,872,795
Administration	3,305,392	-	3,305,392
Fundraising	262,316	-	262,316
Total Expenses	33,440,503	-	33,440,503
Change in net assets	736,218	(400,000)	336,218
Net assets, beginning of year	6,859,886	400,000	7,259,886
Net assets, end of year	\$ 7,596,104	\$ -	\$ 7,596,104

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2021

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 22,389,857	\$ 1,829,703	\$ 183,007	\$ 24,402,567
Occupancy	2,417,364	103,811	-	2,521,175
Professional and service fees	1,051,126	968,811	56,645	2,076,582
Transportation	1,783,813	3,385	-	1,787,198
Depreciation	1,255,027	69,205	-	1,324,232
Instructional	645,426	114,114	6,919	766,459
Office supplies and equipment	490,944	108,293	1,452	600,689
Organizational development	145,388	88,790	12,892	247,070
Authorizer fees	-	360,503	-	360,503
Interest cost	242,358	-	-	242,358
Athletic cost	83,679	-	-	83,679
Outreach	63,682	11,238	-	74,920
Miscellaneous	42,172	(13,288)	-	28,884
Staff development	-	-	13,187	13,187
Total Expenses	<u>\$ 30,610,836</u>	<u>\$ 3,644,565</u>	<u>\$ 274,102</u>	<u>\$ 34,529,503</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2020

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 21,017,494	\$ 1,349,409	\$ 186,276	\$ 22,553,179
Occupancy	2,379,600	84,391	-	2,463,991
Professional and service fees	1,321,907	929,814	37,021	2,288,742
Transportation	2,012,224	9,868	322	2,022,414
Depreciation	1,175,302	139,330	-	1,314,632
Instructional	566,467	191,665	3,621	761,753
Office supplies and equipment	649,235	91,270	448	740,953
Organizational development	223,483	167,939	27,113	418,535
Authorizer fees	-	320,184	-	320,184
Interest cost	251,796	-	-	251,796
Athletic cost	220,667	-	-	220,667
Outreach	34,570	6,101	-	40,671
Miscellaneous	20,050	15,421	-	35,471
Staff development	-	-	7,515	7,515
Total Expenses	<u>\$ 29,872,795</u>	<u>\$ 3,305,392</u>	<u>\$ 262,316</u>	<u>\$ 33,440,503</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF CASH FLOWS

YEARS ENDED JUNE 30, 2021 AND 2020

	2021	2020
Cash flows from operating activities:		
Change in net assets	\$ 8,212,984	\$ 336,218
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Depreciation	1,324,232	1,314,632
Changes in operating assets and liabilities:		
Accounts receivable	(1,904,329)	60,657
Prepaid expenses and other	(35,113)	414,364
Accounts payable	619,007	84,046
Accrued expenses	444,054	(797,806)
Other current liabilities	-	(127,304)
Net cash flows from operating activities	<u>8,660,835</u>	<u>1,284,807</u>
Cash flows from investing activities:		
Purchase of property and equipment	(1,251,133)	(1,612,082)
Net cash flows from investing activities	<u>(1,251,133)</u>	<u>(1,612,082)</u>
Cash flows from financing activities:		
Proceeds from notes payable	300,000	-
Payments on notes payable	(158,001)	(162,616)
Net cash flows from financing activities	<u>141,999</u>	<u>(162,616)</u>
Net change in cash and cash equivalents	7,551,701	(489,891)
Cash and cash equivalents, beginning of year	4,887,232	5,377,123
Cash and cash equivalents, end of year	<u>\$ 12,438,933</u>	<u>\$ 4,887,232</u>
Supplemental disclosure of cash flow information:		
Cash paid during the year for interest	<u>\$ 242,358</u>	<u>\$ 251,796</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2021 AND 2020*

Note 1—Nature of operations and summary of significant accounting policies

LEAD Public Schools, Inc. ("LPS") was incorporated during 2010 as a charter management organization that starts and operates public charter schools in Middle Tennessee. Public charter schools in Tennessee are public schools operated under a charter contract with a local district, statewide district, or the state board of education, and governed under a nonprofit Board of Directors separate from the district. Currently, LPS operates five charter schools as single member limited liability corporations consisting of LEAD Academy, Nonprofit, LLC (the "Academy"); Cameron College Prep, Nonprofit, LLC ("Cameron"); Brick Church College Prep, Nonprofit, LLC ("Brick Church"); LEAD Prep Southeast, Nonprofit, LLC ("Southeast"); and Neely's Bend College Prep, Nonprofit, LLC ("Neely's Bend"). In addition, LPS operates a real estate holding company, LEAD Real Estate Holdings, Nonprofit, LLC ("LEAD Real Estate").

The Academy, Cameron, Brick Church, Southeast, and Neely's Bend were organized in accordance with Section 6(1)(a) of the Tennessee Public Charter School Act of 2002 (the "Act"). Pursuant to the Act, public charter schools are part of the state's public education program offering an alternative means within the public school system for accomplishing necessary outcomes of education. The Academy entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on July 23, 2006 to operate a charter school in Nashville, Tennessee. The Academy began classes in July 2007 with fifth and sixth grade classes. The Academy has since added a grade each year until it reached twelfth grade. Cameron entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 1, 2010, to operate a charter school in Nashville, Tennessee. Cameron began classes in August 2011 with fifth grade and has since added a grade each year through the eighth grade. Brick Church entered into a Charter School Agreement with the Tennessee Achievement School District ("ASD") on June 1, 2012 to operate a charter school in Nashville, Tennessee. Brick Church began classes in August 2012 with fifth grade and has since added a grade each year through the eighth grade. Southeast entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 25, 2011, to operate a charter school in Nashville, Tennessee. Southeast began classes in August 2013 and currently enrolls students from fifth grade through the twelfth grade. Neely's Bend entered into a Charter School Agreement with the Tennessee Achievement School District on May 21, 2015, to operate a charter school in Madison, Tennessee. Neely's Bend began classes in August 2015 with fifth grade and has since added a grade each year through the eighth grade.

In accordance with the charter agreements of the Academy, Cameron, and Southeast enrollment is open to any student within the Metropolitan Nashville Public Schools ("MNPS") System who resides in Davidson County. Brick Church and Neely's Bend enrollment is restricted to students who would have been zoned to Brick Church Middle School, Neely's Bend Middle School, respectively, or other ASD Priority School. If space exists after planned enrollment of zoned students, other eligible students may enroll or be included in an enrollment lottery pursuant to T.C.A. Section 49-13-106. The Academy currently enrolls students in grades nine through twelve. The Academy's charter provides for a total enrollment of 472. Cameron currently enrolls students in grades five through nine. Cameron's charter provides for a total enrollment of 683. Brick Church currently enrolls students in grades five through nine. Brick Church's charter provides for a total enrollment of 332. Southeast currently enrolls students in grades five through twelve. Southeast's charter provides for a total enrollment of 865. Neely's Bend currently enrolls students in grades five through nine. Neely's Bend's charter provides for a total enrollment of 488.

Basis of Presentation – The accompanying consolidated financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America ("U.S. GAAP"). The consolidated financial statements present the financial position and results of operations of LPS, the Academy, Cameron, Brick Church, Southeast, Neely's Bend, and LEAD Real Estate (collectively, the "Organization").

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2021 AND 2020*

Note 1—Nature of operations and summary of significant accounting policies (continued)

The Organization presents its consolidated financial statements in accordance with Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”) guidance for not-for-profit organizations. Under this guidance, net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restriction – Net assets that are not subject to donor-imposed stipulations. All contributions are considered available for general use unless specifically restricted by the donor.

Net Assets With Donor Restriction – Net assets subject to donor-imposed stipulations that may or will be met, either by actions of the Organization and/or the passage of time. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restriction and reported in the statements of activities as net assets released from restriction. If a restriction is fulfilled in the same time period in which the contribution is received, the support is reported as increases to net assets without donor restriction. Additionally, some net assets are subject to a donor-imposed stipulation that they be held in perpetuity by the Organization. There were no net assets that were required to be held in perpetuity at June 30, 2021 or 2020.

Use of Estimates – The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements, and the reported amounts of revenues and expenses and allocation of functional expenses during the reporting period. Actual results could differ from those estimates.

Cash and Cash Equivalents – For purposes of the consolidated statements of cash flows, the Organization considers all highly-liquid investments with original maturities when purchased of less than three months to be cash equivalents. The cash accounts are held primarily by financial institutions and at times may exceed amounts that are federally insured.

Accounts Receivable – Accounts receivable represent amounts due from grants or other sources which have been approved but not received. Management considers all accounts collectible and, therefore, an allowance for doubtful accounts has not been recognized in the consolidated financial statements.

Property and Equipment – Property and equipment are recorded at acquisition cost less accumulated depreciation, if purchased, or the fair value on the date received, if donated. The cost of routine maintenance and repairs is expensed as incurred. Expenditures which materially extend the economic lives, change capacities, or improve the efficiency of the related assets are capitalized. Upon sale or retirement, the cost and related accumulated depreciation are removed from the respective accounts, and the resulting gain or loss, if any, is included in the consolidated statement of activities. Depreciation is provided using the straight-line method over the estimated useful lives of the assets, ranging from three to seven years, or over the term of the lease for leasehold improvements, if less.

Donated Materials, Services, and Assets – Donated materials and services, if any, are reflected as contributions in the accompanying consolidated financial statements at their estimated values at the date of receipt. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation, and are recorded at their fair values in the period received.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2021 AND 2020*

Note 1—Nature of operations and summary of significant accounting policies (continued)

Donations of property and equipment are recorded as support at their estimated fair value. Such donations are reported as net assets without donor restriction unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restriction. Absent donor stipulations regarding how long those donated assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Organization reclassifies net assets with donor restriction to net assets without donor restriction at that time.

Contributions – Contributions and unconditional promises to give are recognized as revenue when made or a written promise to give is conveyed, whichever is earliest. Contributions of assets other than cash are recorded at estimated fair value at the date of donation. Contributions received with donor stipulations that restrict the use of the assets and promises to give that have time or purpose restrictions are reported as revenue with donor restrictions. When the use or time restriction is met, the amount is reported as revenue without donor restrictions and a reduction in revenue with donor restrictions. The Organization recognizes contributions when cash, securities, or other assets or an unconditional promise to give are received. Conditional promises to give – that is, those with a measurable performance or other barrier and a right of return – are not recognized until the conditions on which they depend have been met. At December 31, 2021 and 2020, the Organization did not have any conditional promises to give.

Grants – The Organization receives federal financial assistance through state agencies. The expenditure of funds received under these programs generally requires compliance with terms and conditions specified in the grant agreements and are subject to audit by the grantor agencies.

Functional Allocation of Expenses – The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. While most costs have been directly assigned to a functional category, certain joint costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis. Expenses that are allocated consist primarily of salaries and wages which are allocated based on time and effort.

Income Taxes – The Organization is exempt from federal income taxes under the provisions of Internal Revenue Code Section 501(c)(3) and, accordingly, no provision for income taxes is included in the consolidated financial statements.

The Organization follows FASB ASC guidance clarifying the accounting for uncertainty in income taxes recognized in an entity's financial statements. This guidance prescribes a minimum probability threshold that a tax position must meet before a financial statement benefit is recognized. The minimum threshold is defined as a tax position that is more likely than not to be sustained upon examination by the applicable taxing authority, including resolution of any related appeals or litigation processes, based on the technical merits of the position. The tax benefit to be recognized is measured as the largest amount of benefit that is greater than 50% likely of being realized upon ultimate settlement. The Organization has no tax penalties or interest reported in the accompanying consolidated financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

Note 1—Nature of operations and summary of significant accounting policies (continued)

Adoption of New Accounting Pronouncement – Accounting Policies for Future Pronouncements – In May 2014, FASB issued Accounting Standards Update (“ASU”) 2014-09, *Revenue from Contracts with Customers*. ASU 2014-09 clarifies the principles for recognizing revenue and develops a common revenue standard under U.S. GAAP under which an entity should recognize revenue to depict the transfer of promised goods or services to customers in an amount that reflects the consideration to which the entity expects to be entitled in exchange for those goods or services. ASU 2014-09 is effective for the Organization for the year ending June 30, 2021. The adoption of this standard did not have a significant impact on the Organization’s consolidated financial statements.

Accounting Policies for Future Pronouncements – In February 2016, FASB issued ASU 2016-02, *Leases*. The standard requires all leases with lease terms over 12 months to be capitalized as a right-of-use asset and lease liability on the statement of financial position at the date of lease commencement. Leases will be classified as either finance or operating. This distinction will be relevant for the pattern of expense recognition in the statement of activities. This standard will be effective for the year ending June 30, 2023. The Organization is currently evaluating the effect of the implementation of this new standard.

Subsequent Events – The Organization evaluated subsequent events through December 20, 2021, when these consolidated financial statements were available to be issued.

Note 2—Liquidity and availability of resources

The Organization regularly monitors liquidity required to meet its operating needs and other contractual commitments. For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Organization considers all expenditures related to its ongoing program service activities as well as the conduct of services undertaken to support those activities to be general expenditures. The Organization maintains a line of credit with maximum borrowings of \$1,000,000 (see Note 6) with a financial institution that is drawn upon during the year to manage cash flow, if needed. Financial assets available for general expenditure, that is, without donor restriction or other restrictions limiting their use within one year of the consolidated statements of financial position, comprise the following at June 30:

	2021	2020
Financial assets at June 30:		
Cash and cash equivalents	\$ 12,438,933	\$ 4,887,232
Accounts receivable	3,380,988	1,476,659
Total financial assets	15,819,921	6,363,891
Less amounts not available to be used for general expenditures within one year	(45,000)	-
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 15,774,921</u>	<u>\$ 6,363,891</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

Note 3—Property and equipment

Property and equipment, net consists of the following at June 30:

	2021	2020
Land	\$ 542,960	\$ 542,960
Buildings and improvements	8,207,072	8,159,459
Computer equipment	3,487,863	2,687,904
Furniture and fixtures	425,304	421,224
Office equipment	184,162	138,962
Textbooks	166,177	166,177
Leasehold improvements	1,665,092	1,357,296
School buses	426,284	426,284
	15,104,914	13,900,266
Less accumulated depreciation	(6,972,392)	(5,694,645)
	<u>\$ 8,132,522</u>	<u>\$ 8,205,621</u>

Depreciation expense totaled \$1,324,233 and \$1,314,632 for the years ended June 30, 2021 and 2020, respectively.

Note 4—Operating leases

During 2014, Cameron entered into a lease arrangement with MNPS for certain educational facilities starting July 1, 2014 and expires June 30, 2021. The lease requires monthly rent payments of \$31,417 subject to annual increases of 2%. Effective July 1, 2015, this lease was amended permitting the Academy's ninth grade to use a portion of Cameron's leased space. The amendment required monthly rental payments of \$25,957 from Cameron and \$10,347 from the Academy subject to annual increases of 2%. The amendment also gave the Organization the right to terminate the lease subject to a 60-day written notice. Effective July 1, 2017, the lease was amended permitting the Academy's tenth through twelfth grades to use a portion of Cameron's leased space. The amendment requires monthly rental payments of \$21,982 from Cameron and \$23,371 from the Academy subject to annual increases of 2%. Effective July 1, 2018, the lease was amended reducing the monthly rental payment to \$21,468 subject to annual increases of 2%. Effective July 1, 2021, the lease was amended increasing the monthly rental payment to \$31,459 subject to annual increases of 3% and expiring June 30, 2031. Under the terms of the lease, rent expense totaled \$290,828 and \$262,768 for the years ended June 30, 2021 and 2020, respectively.

As of June 30, 2021, future minimum operating lease payments required are as follows:

Year Ending June 30,

2022	\$ 377,505
2023	388,830
2024	400,495
2025	412,510
2026	424,885
Thereafter	2,323,446
	<u>\$ 4,327,671</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

Note 5—Notes payable

In February 2014, the Organization entered into a note payable with a financial institution for the purchase of certain real estate. During September 2015, this note payable was restructured to a term loan with total borrowings of \$3,900,000 requiring monthly payments of \$24,753 including interest calculated at 4.00%. During July 2017, this term loan was amended to allow additional borrowings of \$2,460,000 and requiring new monthly payments of \$33,363 including interest calculated at 4.25%. Total outstanding amounts plus accrued and unpaid interest are due on October 27, 2022. The agreement is secured by a deed of trust and a negative pledge of the Organization's assets. Amounts outstanding under this note totaled \$5,537,961 and \$5,695,962 at June 30, 2021 and 2020, respectively. Additionally, the agreement contains restrictive covenants that are tested annually on June 30. At June 30, 2021, management believes the Organization was in compliance with the other covenants.

During June 2020, the Organization entered into a loan agreement with CSGF Tennessee, LLC. In July 2020, under terms of the loan, the Organization received \$300,000 to be used for general support and management of the Organization. This note bears no interest. Amounts outstanding under the agreement totaled \$300,000 at June 30, 2021. Total outstanding amounts are due on November 30, 2021.

Future principal payments on the notes are as follows at June 30, 2021:

Years Ending June 30,

2022	\$ 464,947
2023	5,373,014
	<u>\$ 5,837,961</u>

Note 6—Line of credit

The Organization's line of credit has a \$1,000,000 maximum availability and requires interest-only payments in monthly installments at the bank's prime rate with minimum rate of 4.5% until maturity in April 2023 at which time all outstanding principal and interest will be due. There was no balance outstanding on the line of credit as of June 30, 2021 or 2020.

Note 7—Federal grants

The Organization receives federal pass-through funding from various grantor agencies to help meet objectives and accomplish its mission as a charter school. Total federal awards received during the years ended June 30 2021 and 2020 totaled \$4,885,320 and \$2,886,114, respectively.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

Note 8—Concentrations

For the years ended June 30, 2021 and 2020, the Organization received \$36,537,917 (85%) and \$29,190,456 (86%), respectively, of its funding for operations from MNPS based on the state of Tennessee's Basic Education Program ("BEP"). BEP funding is designated to schools based on student enrollment.

Note 9—Retirement plans

Teacher Legacy Pension Plan of TCRS

Plan Description – The Tennessee Consolidated Retirement System ("TCRS") was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies ("LEA") after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

Benefits Provided – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with five years of service credit or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments ("COLA") after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the consumer price index ("CPI") during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest.

Contributions – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions for the Teacher Legacy Pension Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2021 and 2020, to the Teacher Legacy Pension Plan were \$227,037 and \$213,306, respectively, which 10.63% and 9.60% of covered payroll, respectively. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2021 AND 2020*

Note 9—Retirement plans (continued)**Teacher Retirement Plan of TCRS**

Plan Description – The TCRS was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with memberships in TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by LEAs after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

Benefits Provided – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with five years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic COLAs after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the CPI during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

Contributions – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer-contribution rate cannot be less than 4%, except for in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions for the Teacher Retirement Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the years ended June 30, 2021 and 2020, to the Teacher Retirement were \$139,522 and \$114,333, respectively, which is 2.03% of covered payroll for both years. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Members of the Teacher Retirement Plan are also included in a 401(k) component whereby employer contributions are made at 5% of covered payroll.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2021 AND 2020

Note 9—Retirement plans (continued)

Other Plan

The Organization's noncertified employees are covered under a 403(b) plan. Under terms of the plan, employee contributions are matched 200% up to a maximum match of 6% of eligible compensation by the Organization.

Employer contributions for all retirement plans totaled \$1,007,316 and \$1,116,608 for the years ended June 30, 2021 and 2020, respectively.

Note 10—Commitments and contingencies

During 2020, an outbreak of a novel strain on coronavirus ("COVID-19") emerged globally. As a result of the spread of COVID-19, economic uncertainties have arisen that could negatively impact the Organization's revenue and operations for an indeterminable time period. Other financial impacts could occur that are unknown at this time.

**LEAD PUBLIC SCHOOLS, INC.
AND AFFILIATES**

CONSOLIDATED FINANCIAL STATEMENTS

As of and for the Years Ended June 30, 2022 and 2021

And Report of Independent Auditor

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

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Report of Independent Auditor

To the Board of Directors
LEAD Public Schools, Inc. and Affiliates
Nashville, Tennessee

Report on the Consolidated Financial Statements

Opinion

We have audited the accompanying consolidated financial statements of LEAD Public Schools, Inc. and Affiliates (a nonprofit organization), which comprise the consolidated statements of financial position as of June 30, 2022 and 2021, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of LEAD Public Schools, Inc. and Affiliates as of June 30, 2022 and 2021, and the changes in their net assets and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Consolidated Financial Statements* section of our report. We are required to be independent of LEAD Public Schools, Inc. and Affiliates and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Emphasis of Matter

As discussed in Note 1 to the consolidated financial statements, the Organization changed its method of accounting for leases as of July 1, 2021, due to the adoption of the Accounting Standards Update 2016-02, *Leases (Topic 842)*, as amended. Our opinion is not modified with respect to this matter.

Responsibilities of Management for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error. In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about LEAD Public Schools, Inc. and Affiliates' ability to continue as a going concern for a period of one year subsequent to the date of the consolidated financial statements.

Auditor's Responsibilities for the Audit of the Consolidated Financial Statements

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and, therefore, is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users made on the basis of these consolidated financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audits.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliates' internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about LEAD Public Schools, Inc. and Affiliates' ability to continue as a going concern for a reasonable period of time.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated March 30, 2023, on our consideration of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering LEAD Public Schools, Inc. and Affiliate's internal control over financial reporting and compliance.



Nashville, Tennessee
March 30, 2023

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

JUNE 30, 2022 AND 2021

	2022	2021
ASSETS		
Current Assets:		
Cash and cash equivalents	\$ 11,085,693	\$ 12,438,933
Accounts receivable	11,516,319	3,380,988
Prepaid expenses and other	498,074	80,811
Total Current Assets	23,100,086	15,900,732
Right-of-use asset - operating lease	4,099,576	-
Property and equipment, net	7,535,108	8,132,522
Total Assets	\$ 34,734,770	\$ 24,033,254
LIABILITIES AND NET ASSETS		
Current Liabilities:		
Accounts payable	\$ 1,341,312	\$ 1,065,088
Accrued expenses	1,888,714	1,321,117
Operating lease liabilities, current portion	635,322	-
Notes payable, current portion	-	164,947
Total Current Liabilities	3,865,348	2,551,152
Operating lease liabilities, noncurrent portion	3,718,878	-
Notes payable, noncurrent portion	-	5,673,014
Total Liabilities	7,584,226	8,224,166
Net Assets:		
Without donor restrictions	27,150,544	15,764,088
With donor restrictions	-	45,000
Total Net Assets	27,150,544	15,809,088
Total Liabilities and Net Assets	\$ 34,734,770	\$ 24,033,254

The accompanying notes to the consolidated financial statements are an integral part of these statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
Public Support and Revenue:			
District funding	\$ 38,968,491	\$ -	\$ 38,968,491
Federal grants	12,180,680	-	12,180,680
Contributions and other	766,762	373,500	1,140,262
Interest income	35,401	-	35,401
Net assets released from restrictions	418,500	(418,500)	-
Total Public Support and Revenue	52,369,834	(45,000)	52,324,834
Expenses:			
Student instruction and services	37,758,851	-	37,758,851
Administration	2,853,890	-	2,853,890
Fundraising	370,637	-	370,637
Total Expenses	40,983,378	-	40,983,378
Change in net assets	11,386,456	(45,000)	11,341,456
Net assets, beginning of year	15,764,088	45,000	15,809,088
Net assets, end of year	\$ 27,150,544	\$ -	\$ 27,150,544

The accompanying notes to the consolidated financial statements are an integral part of these statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF ACTIVITIES
YEAR ENDED JUNE 30, 2021

	Without Donor Restrictions	With Donor Restrictions	Total
Public Support and Revenue:			
District funding	\$ 37,074,425	\$ -	\$ 37,074,425
Federal grants	4,885,320	-	4,885,320
Contributions and other	482,742	300,000	782,742
Net assets released from restrictions	255,000	(255,000)	-
Total Public Support and Revenue	42,697,487	45,000	42,742,487
Expenses:			
Student instruction and services	30,610,836	-	30,610,836
Administration	3,644,565	-	3,644,565
Fundraising	274,102	-	274,102
Total Expenses	34,529,503	-	34,529,503
Change in net assets	8,167,984	45,000	8,212,984
Net assets, beginning of year	7,596,104	-	7,596,104
Net assets, end of year	<u>\$ 15,764,088</u>	<u>\$ 45,000</u>	<u>\$ 15,809,088</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2022

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 24,721,647	\$ 1,333,937	\$ 314,096	\$ 26,369,680
Occupancy	3,627,880	109,244	2,317	3,739,441
Professional and service fees	1,994,659	591,561	-	2,586,220
Transportation	2,942,908	42,256	-	2,985,164
Depreciation and amortization	1,369,981	10,592	-	1,380,573
Instructional	1,011,321	56,491	7,995	1,075,807
Office supplies and equipment	833,252	36,478	-	869,730
Organizational development	278,942	190,921	-	469,863
Authorizer fees	-	323,401	-	323,401
Interest cost	258,749	-	-	258,749
Athletic cost	297,280	-	-	297,280
Outreach	102,638	-	-	102,638
Miscellaneous	225,752	159,009	-	384,761
Loss on disposal of assets	93,842	-	-	93,842
Staff development	-	-	46,229	46,229
Total Expenses	<u>\$ 37,758,851</u>	<u>\$ 2,853,890</u>	<u>\$ 370,637</u>	<u>\$ 40,983,378</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED JUNE 30, 2021

	Student Instruction and Services	Supporting Services		Total Expenses
		Administration	Fundraising	
Salaries, wages, and benefits	\$ 22,389,857	\$ 1,829,703	\$ 183,007	\$ 24,402,567
Occupancy	2,417,364	103,811	-	2,521,175
Professional and service fees	1,051,126	968,811	56,645	2,076,582
Transportation	1,783,813	3,385	-	1,787,198
Depreciation	1,255,027	69,205	-	1,324,232
Instructional	645,426	114,114	6,919	766,459
Office supplies and equipment	490,944	108,293	1,452	600,689
Organizational development	145,388	88,790	12,892	247,070
Authorizer fees	-	360,503	-	360,503
Interest cost	242,358	-	-	242,358
Athletic cost	83,679	-	-	83,679
Outreach	63,682	11,238	-	74,920
Miscellaneous	42,172	(13,288)	-	28,884
Staff development	-	-	13,187	13,187
Total Expenses	<u>\$ 30,610,836</u>	<u>\$ 3,644,565</u>	<u>\$ 274,102</u>	<u>\$ 34,529,503</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
CONSOLIDATED STATEMENTS OF CASH FLOWS

YEARS ENDED JUNE 30, 2022 AND 2020

	2022	2021
Cash flows from operating activities:		
Change in net assets	\$ 11,341,456	\$ 8,212,984
Adjustments to reconcile change in net assets to net cash flows from operating activities:		
Depreciation and amortization	1,380,573	1,324,232
Loss on disposal of asset	93,842	-
Noncash lease expense	254,624	-
Changes in operating assets and liabilities:		
Accounts receivable	(8,135,331)	(1,904,329)
Prepaid expenses and other	(417,263)	(35,113)
Accounts payable	276,224	619,007
Accrued expenses	567,597	444,054
Net cash flows from operating activities	<u>5,361,722</u>	<u>8,660,835</u>
Cash flows from investing activities:		
Purchase of property and equipment	<u>(877,001)</u>	<u>(1,251,133)</u>
Net cash flows from investing activities	<u>(877,001)</u>	<u>(1,251,133)</u>
Cash flows from financing activities:		
Proceeds from notes payable	-	300,000
Payments on notes payable	<u>(5,837,961)</u>	<u>(158,001)</u>
Net cash flows from financing activities	<u>(5,837,961)</u>	<u>141,999</u>
Net change in cash and cash equivalents	(1,353,240)	7,551,701
Cash and cash equivalents, beginning of year	<u>12,438,933</u>	<u>4,887,232</u>
Cash and cash equivalents, end of year	<u><u>\$ 11,085,693</u></u>	<u><u>\$ 12,438,933</u></u>
Supplemental disclosure of cash flow information:		
Cash paid during the year for interest	<u><u>\$ 258,749</u></u>	<u><u>\$ 242,358</u></u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2022 AND 2021

Note 1—Nature of operations and summary of significant accounting policies

LEAD Public Schools, Inc. ("LPS") was incorporated during 2010 as a charter management organization that starts and operates public charter schools in Middle Tennessee. Public charter schools in Tennessee are public schools operated under a charter contract with a local district, statewide district, or the state board of education, and governed under a nonprofit Board of Directors separate from the district. Currently, LPS operates five charter schools as single member limited liability corporations consisting of LEAD Academy, Nonprofit, LLC (the "Academy"); Cameron College Prep, Nonprofit, LLC ("Cameron"); Brick Church College Prep, Nonprofit, LLC ("Brick Church"); LEAD Prep Southeast, Nonprofit, LLC ("Southeast"); and Neely's Bend College Prep, Nonprofit, LLC ("Neely's Bend"). In addition, LPS operates a real estate holding company, LEAD Real Estate Holdings, Nonprofit, LLC ("LEAD Real Estate").

Academy, Cameron, Brick Church, Southeast, and Neely's Bend were organized in accordance with Section 6(1)(a) of the Tennessee Public Charter School Act of 2002 (the "Act"). Pursuant to the Act, public charter schools are part of the state's public education program offering an alternative means within the public school system for accomplishing necessary outcomes of education. Academy entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on July 23, 2006 to operate a charter school in Nashville, Tennessee. Academy began classes in July 2007 with fifth and sixth grade classes. Academy began classes in July 2007 with fifth and sixth grade classes and has since transitioned to serving ninth through twelfth grades. Cameron entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 1, 2010, to operate a charter school in Nashville, Tennessee. Cameron began classes in August 2011 with fifth grade and has since added a grade each year through the eighth grade. Brick Church entered into a Charter School Agreement with the Tennessee Achievement School District ("ASD") on June 1, 2012 to operate a charter school in Nashville, Tennessee. Brick Church began classes in August 2012 with fifth grade and has since added a grade each year through the eighth grade. Southeast entered into a Charter School Agreement with the Metropolitan Nashville Board of Education on October 25, 2011, to operate a charter school in Nashville, Tennessee. Southeast began classes in August 2013 and currently enrolls students from fifth grade through the twelfth grade. Neely's Bend entered into a Charter School Agreement with the Tennessee Achievement School District on May 21, 2015, to operate a charter school in Madison, Tennessee. Neely's Bend began classes in August 2015 with fifth grade and has since added a grade each year through the eighth grade.

In accordance with the charter agreements of Academy, Cameron, and Southeast enrollment is open to any student within the Metropolitan Nashville Public Schools ("MNPS") System who resides in Davidson County. Brick Church and Neely's Bend enrollment is restricted to students who would have been zoned to Brick Church Middle School, Neely's Bend Middle School, respectively, or other ASD Priority School. If space exists after planned enrollment of zoned students, other eligible students may enroll or be included in an enrollment lottery pursuant to T.C.A. Section 49-13-106. Academy currently enrolls students in grades nine through twelve. Academy's charter provides for a total enrollment of 458. Cameron currently enrolls students in grades five through nine. Cameron's charter provides for a total enrollment of 627. Brick Church currently enrolls students in grades five through nine. Brick Church's charter provides for a total enrollment of 275. Southeast currently enrolls students in grades five through twelve. Southeast's charter provides for a total enrollment of 805. Neely's Bend currently enrolls students in grades five through nine. Neely's Bend's charter provides for a total enrollment of 465.

Basis of Presentation – The accompanying consolidated financial statements have been prepared in conformity with accounting principles generally accepted in the United States of America ("U.S. GAAP"). The consolidated financial statements present the financial position and results of operations of LPS, Academy, Cameron, Brick Church, Southeast, Neely's Bend, and LEAD Real Estate (collectively, the "Organization").

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2022 AND 2021*

Note 1—Nature of operations and summary of significant accounting policies (continued)

The Organization presents its consolidated financial statements in accordance with Financial Accounting Standards Board ("FASB") Accounting Standards Codification ("ASC") guidance for not-for-profit organizations. Under this guidance, net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

Net Assets Without Donor Restrictions – Net assets that are not subject to donor-imposed stipulations. All contributions are considered available for general use unless specifically restricted by the donor.

Net Assets With Donor Restrictions – Net assets subject to donor-imposed stipulations that may or will be met, either by actions of the Organization and/or the passage of time. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions. If a restriction is fulfilled in the same time period in which the contribution is received, the support is reported as increases to net assets without donor restrictions. Additionally, some net assets are subject to a donor-imposed stipulation that they be held in perpetuity by the Organization. There were no net assets that were required to be held in perpetuity at June 30, 2022 or 2021.

Use of Estimates – The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the consolidated financial statements, and the reported amounts of revenues and expenses and allocation of functional expenses during the reporting period. Actual results could differ from those estimates.

Cash and Cash Equivalents – For purposes of the consolidated statements of cash flows, the Organization considers all highly-liquid investments with original maturities when purchased of less than three months to be cash equivalents. The cash accounts are held primarily by financial institutions and at times may exceed amounts that are federally insured.

Accounts Receivable – Accounts receivable represent amounts due from grants or other sources which have been approved but not received. Management considers all accounts collectible and, therefore, an allowance for doubtful accounts has not been recognized in the consolidated financial statements.

Property and Equipment – Property and equipment are recorded at acquisition cost less accumulated depreciation, if purchased, or the fair value on the date received, if donated. The cost of routine maintenance and repairs is expensed as incurred. Expenditures which materially extend the economic lives, change capacities, or improve the efficiency of the related assets are capitalized. Upon sale or retirement, the cost and related accumulated depreciation are removed from the respective accounts, and the resulting gain or loss, if any, is included in the consolidated statement of activities. Depreciation is provided using the straight-line method over the estimated useful lives of the assets, ranging from three to seven years, or over the term of the lease for leasehold improvements, if less.

Donated Materials, Services, and Assets – Donated materials and services, if any, are reflected as contributions in the accompanying consolidated financial statements at their estimated values at the date of receipt. Contributions of donated services that create or enhance nonfinancial assets or that require specialized skills, are provided by individuals possessing those skills, and would typically need to be purchased if not provided by donation and are recorded at their fair values in the period received.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2022 AND 2021*

Note 1—Nature of operations and summary of significant accounting policies (continued)

Donations of property and equipment are recorded as support at their estimated fair value. Such donations are reported as net assets without donor restrictions unless the donor has restricted the donated asset to a specific purpose. Assets donated with explicit restrictions regarding their use and contributions of cash that must be used to acquire property and equipment are reported as net assets with donor restrictions. Absent donor stipulations regarding how long those donated assets must be maintained, the Organization reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor. The Organization reclassifies net assets with donor restrictions to net assets without donor restrictions at that time.

Contributions – Contributions and unconditional promises to give are recognized as revenue when made or a written promise to give is conveyed, whichever is earliest. Contributions of assets other than cash are recorded at estimated fair value at the date of donation. Contributions received with donor stipulations that restrict the use of the assets and promises to give that have time or purpose restrictions are reported as revenue with donor restrictions. When the use or time restriction is met, the amount is reported as revenue without donor restrictions and a reduction in revenue with donor restrictions. The Organization recognizes contributions when cash, securities, or other assets or an unconditional promise to give are received. Conditional promises to give – that is, those with a measurable performance or other barrier and a right of return – are not recognized until the conditions on which they depend have been met. At December 31, 2022 and 2021, the Organization did not have any conditional promises to give.

Grants – The Organization receives federal financial assistance through state agencies. The expenditure of funds received under these programs generally requires compliance with terms and conditions specified in the grant agreements and are subject to audit by the grantor agencies.

Functional Allocation of Expenses – The costs of providing program and other activities have been summarized on a functional basis in the statements of activities. While most costs have been directly assigned to a functional category, certain joint costs have been allocated among program services and supporting services benefited. Such allocations are determined by management on an equitable basis. Expenses that are allocated consist primarily of salaries and wages which are allocated based on time and effort.

Income Taxes – The Organization is exempt from federal income taxes under the provisions of Internal Revenue Code Section 501(c)(3) and, accordingly, no provision for income taxes is included in the consolidated financial statements.

The Organization follows FASB ASC guidance clarifying the accounting for uncertainty in income taxes recognized in an entity's financial statements. This guidance prescribes a minimum probability threshold that a tax position must meet before a financial statement benefit is recognized. The minimum threshold is defined as a tax position that is more likely than not to be sustained upon examination by the applicable taxing authority, including resolution of any related appeals or litigation processes, based on the technical merits of the position. The tax benefit to be recognized is measured as the largest amount of benefit that is greater than 50% likely of being realized upon ultimate settlement. The Organization has no tax penalties or interest reported in the accompanying consolidated financial statements.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2022 AND 2021

Note 1—Nature of operations and summary of significant accounting policies (continued)

Change in Accounting Principles – In February 2016, FASB issued ASU 2016-02, *Leases (Topic 842)*, which supersedes existing guidance for accounting for leases under *Topic 840, Leases*. FASB also subsequently issued additional ASUs which amend and clarify Topic 842. The most significant change in the new leasing guidance is the requirement to recognize right-to-use (“ROU”) assets and lease liabilities for operating leases on the balance sheet.

The Organization adopted these ASUs effective July 1, 2021 using the modified retrospective approach. As a result of adopting these ASUs, the Organization recorded ROU assets and lease liabilities of approximately \$4,634,965. Adoption of the new standard did not materially impact the Organizations change in net assets and had no impact on cash flows.

Subsequent Events – The Organization evaluated subsequent events through March 30, 2023, when these consolidated financial statements were available to be issued.

Note 2—Liquidity and availability of resources

The Organization regularly monitors liquidity required to meet its operating needs and other contractual commitments. For purposes of analyzing resources available to meet general expenditures over a 12-month period, the Organization considers all expenditures related to its ongoing program service activities as well as the conduct of services undertaken to support those activities to be general expenditures. The Organization maintains a line of credit with maximum borrowings of \$1,000,000 (see Note 6) with a financial institution that is drawn upon during the year to manage cash flow, if needed. Financial assets available for general expenditure, that is, without donor restrictions or other restrictions limiting their use within one year of the consolidated statements of financial position, comprise the following at June 30:

	<u>2022</u>	<u>2021</u>
Financial assets at June 30:		
Cash and cash equivalents	\$ 11,085,693	\$ 12,438,933
Accounts receivable	11,516,319	3,380,988
Total financial assets	22,602,012	15,819,921
Less amounts not available to be used for general expenditures within one year	<u>-</u>	<u>(45,000)</u>
Financial assets available to meet cash needs for general expenditures within one year	<u>\$ 22,602,012</u>	<u>\$ 15,774,921</u>

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS
JUNE 30, 2022 AND 2021
Note 3—Property and equipment

Property and equipment, net consists of the following at June 30:

	2022	2021
Land	\$ 542,960	\$ 542,960
Buildings and improvements	8,688,103	8,207,072
Computer equipment	2,794,355	3,487,863
Furniture and fixtures	299,319	425,304
Office equipment	119,281	184,162
Textbooks	-	166,177
Leasehold improvements	1,607,868	1,665,092
School buses	-	426,284
	<u>14,051,886</u>	<u>15,104,914</u>
Less accumulated depreciation	<u>(6,516,778)</u>	<u>(6,972,392)</u>
	<u><u>\$ 7,535,108</u></u>	<u><u>\$ 8,132,522</u></u>

Depreciation expense totaled \$1,380,573 and \$1,324,233 for the years ended June 30, 2022 and 2021, respectively.

Note 4—Leases

The Organization leases building space for school activity use. The Organization determines whether a contract contains a lease at inception by determining if the contract conveys the right to control the use of identified property, plant or equipment for a period of time in exchange for consideration. The Organization has elected to account for lease and non-lease components as a single component.

Right-of-use ("ROU") assets and lease liabilities are recognized at the commencement date based on the present value of the future minimum lease payments over the lease term. Renewal and termination clauses that are factored into the determination of the lease term if it is reasonably certain that these options would be exercised by the Organization. Lease assets are amortized over the lease term unless there is a transfer of title or purchase option reasonably certain of exercise, in which case the asset life is used. Certain of our lease agreements include variable payments. Variable lease payments not dependent on an index or rate primarily consist of common area maintenance charges and are not included in the calculation of the ROU asset and lease liability and are expensed as incurred. In order to determine the present value of lease payments, the Organization uses the implicit rate when it is readily determinable. As most of the Organization's leases do not provide an implicit rate, management uses the Organization's incremental borrowing rate based on the information available at lease commencement to determine the present value of lease payments.

The lease agreements do not contain any material residual value guarantees or material restrictive covenants. The Organization does not have leases where it is involved with the construction or design of an underlying asset. The Organization has no material obligation for leases signed but not yet commenced as of June 30, 2022. The Organization does not have any sublease activities.

The Organization has elected the practical expedient not to recognize leases with terms of 12 months or less on the statement of financial position and instead recognize the lease payments on a straight-line basis over the term of the lease and variable lease payments in the period in which the obligation for the payments is incurred. Therefore, short-term lease expense for the period does not reflect ongoing short-term lease commitments. Lease expense for such short-term leases was not material for the year ended June 30, 2022.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2022 AND 2021

Note 4—Leases

As of June 30, 2022, future minimum operating lease payments required are as follows:

Years Ending June 30,

2023	\$	635,322
2024		653,062
2025		671,307
2026		550,013
2027		566,514
Thereafter		<u>2,441,184</u>
Total lease payments		5,517,402
Less interest		<u>(1,163,202)</u>
Present value of lease liabilities	\$	<u><u>4,354,200</u></u>

Required supplemental information relating to our leases for the years ended June 30, 2022 is as follows:

Operating:

Operating leases, included in operating expenses	\$	743,531
Short-term leases, included in operating expenses		<u>129,394</u>
Net operating lease cost	\$	<u><u>872,925</u></u>

Lease Term and Discount Rate:

(in years)

Weighted average remaining lease term - operating leases	6.00
Weighted average discount rate - operating leases	5.50%

Note 5—Notes payable

In February 2014, the Organization entered into a note payable with a financial institution for the purchase of certain real estate. During September 2015, this note payable was restructured to a term loan with total borrowings of \$3,900,000 requiring monthly payments of \$24,753 including interest calculated at 4.00%. During July 2017, this term loan was amended to allow additional borrowings of \$2,460,000 and requiring new monthly payments of \$33,363 including interest calculated at 4.25%. Total outstanding amounts plus accrued and unpaid interest were paid off on May 27, 2022. The agreement is secured by a deed of trust and a negative pledge of the Organization's assets. During FY22, the Organization paid this debt in full. Amounts outstanding under this note totaled \$0- and \$5,537,961 at June 30, 2022 and 2021, respectively. Additionally, the agreement contains restrictive covenants that are tested annually on June 30. At June 30, 2022, management believes the Organization was in compliance with the other covenants.

During June 2020, the Organization entered into a loan agreement with CSGF Tennessee, LLC. In July 2020, under terms of the loan, the Organization received \$300,000 to be used for general support and management of the Organization. This note bears no interest. Amounts outstanding under the agreement totaled \$300,000 at June 30, 2021. Total outstanding amounts plus accrued and unpaid interest were paid off in full on May 27, 2022.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS*JUNE 30, 2022 AND 2021*

Note 6—Line of credit

The Organization's line of credit has a \$1,000,000 maximum availability and requires interest-only payments in monthly installments at the bank's prime rate with minimum rate of 4.5% until maturity in April 2023 at which time all outstanding principal and interest will be due. There was no balance outstanding on the line of credit as of June 30, 2022 or 2021.

Note 7—Federal grants

The Organization receives federal pass-through funding from various grantor agencies to help meet objectives and accomplish its mission as a charter school. Total federal awards received during the years ended June 30 2022 and 2021 totaled \$12,180,680 and \$4,885,320, respectively.

Note 8—Concentrations

For the years ended June 30, 2022 and 2021, the Organization received \$38,968,491 (74%) and \$36,537,917 (85%), respectively, of its funding for operations from MNPS and ASD based on the state of Tennessee's Basic Education Program ("BEP"). BEP funding is designated to schools based on student enrollment.

Note 9—Retirement plans**Teacher Legacy Pension Plan of TCRS**

Plan Description – The Tennessee Consolidated Retirement System ("TCRS") was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by Local Education Agencies ("LEA") after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

Teacher Retirement Plan of TCRS

Benefits Provided – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with five years of service credit or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments ("COLA") after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the consumer price index ("CPI") during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTSJUNE 30, 2022 AND 2021

Note 9—Retirement plans (continued)

Contributions – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions for the Teacher Legacy Pension Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions by the Organization for the year ended June 30, 2022 and 2021, to the Teacher Legacy Pension Plan were \$222,215 and \$227,037, respectively, which is 10.27% and 10.63% of covered payroll, respectively. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Plan Description – The TCRS was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans in the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at <https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies>. Teachers employed by the Organization with memberships in TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost-sharing, multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014, but will continue providing benefits to existing members and retirees. Beginning July 1, 2014, the Teacher Retirement Plan became effective for teachers employed by LEAs after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

Benefits Provided – Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with five years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive-year average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for non-service-related disability eligibility. The service-related and non-service-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10% and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic COLAs after retirement. A COLA is granted each July for annuitants retired prior to July 2 of the previous year. The COLA is based on the change in the CPI during the prior calendar year, capped at 3%, and applied to the current benefit. No COLA is granted if the change in the CPI is less than ½%. A 1% COLA is granted if the CPI change is between ½% and 1%. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

Contributions – Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5% of salary. LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer-contribution rate cannot be less than 4%, except for in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions for the Teacher Retirement Plan are required to be paid. TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted.

LEAD PUBLIC SCHOOLS, INC. AND AFFILIATES
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2022 AND 2021

Note 9—Retirement plans (continued)

Employer contributions by the Organization for the years ended June 30, 2022 and 2021, to the Teacher Retirement were \$173,991 and \$139,522, respectively, which is 2.03% of covered payroll for both years. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Members of the Teacher Retirement Plan are also included in a 401(k) component whereby employer contributions are made at 5% of covered payroll.

Other Plan

The Organization's noncertified employees are covered under a 403(b) plan. Under terms of the plan, employee contributions are matched 200% up to a maximum match of 6% of eligible compensation by the Organization.

Employer contributions for all retirement plans totaled \$1,127,069 and \$1,007,316 for the years ended June 30, 2022 and 2021, respectively.

LL. Internal Financial Statement

Lead Public Schools
IS_Budget_vs_Actual_BOD_New
As of December 31, 2023
As of Date:

12/31/2023

	Year To Date 12/31/2023
	Actual YTD
Revenue	
TISA	18,754,631
Federal Grants	2,326,740
Philanthropy	226,376
Other Misc Revenue	1,858
Total Revenue	21,309,605
Expenses	
Personnel Expense	15,801,029
Instructional	1,594,060
Student Support	323,595
School Operations	1,061,960
Transportation	1,679,330
Facilities	1,663,569
G & A	940,608
Authorizer Fee	175,949
Total Expenses	23,240,100
EBITDA	(1,930,495)

Lead Public Schools
Balance Sheet Detail Trend
As of December 31, 2023
(Unaudited - For Management Purposes Only)
Month Ending 12/31/2023

	<u>Actual</u>
Assets	
Current Assets	
Cash and Cash Equivalents	20,058,305
Accounts Receivable	810,089
Other Receivables	75,313
Prepaid Expenses	3,574,938
Total Current Assets	<u>24,518,645</u>
Other Long Term Assets	<u>97,554</u>
Fixed Assets	<u>17,610,213</u>
Accumulated Depreciation	<u>(8,874,169)</u>
Total Assets	<u><u>33,352,243</u></u>
Liabilities and Equity	
Liabilities	
Current Liabilities	
Account Payables	214,724
Accrued Salaries and Benefits	4,066,254
Total Current Liabilities	<u>4,280,978</u>
Long Term Liabilities	<u>273,730</u>
Total Liabilities	<u>4,554,708</u>
Equity	
Net Assets	28,440,931
Net Profit and Loss	356,604
Total Equity	<u>28,797,535</u>
Total Liabilities and Equity	<u><u>33,352,243</u></u>

LEAD Public Schools Start Up Plan				
Item	Owner	Involved	Start	End
OVERALL				
General School Startup Key Dates				
School leadership teams announced	HR		Jul	Sep
Set calendar for next academic year	Ops		Dec	Mar
Create staff PD schedule	Schools		Jan	Jun
School leader training	Academics		Jan	Feb
New / returning staff PD	Academics		Jun	Aug
Finalize revisions to district operating agreement	CEO	Ops	Dec	May
FINANCE			Dec	Dec
Budget			Dec	Dec
Revise startup budget, as needed	Schools	Finance, Ops	Dec	Jan
Finalize budget templates for next FY, including enrollment / revenue scenarios	Finance	Ops	Dec	Jan
Provide initial teacher hiring guidance based on financial model	Finance	Talent, SDs	Dec	Jan
Train internal budget managers on planning tools	Finance	SDs, Ops	Dec	Jan
First draft budgets due	Schools	Finance	Dec	Feb
Enrollment and staffing projections / updates to IT & others	Finance	Enrollment	Feb	Apr
Second draft budgets due	Schools	Finance	Dec	Mar
Update TISA assumptions from state / district	Finance		Apr	May
Internal final budget approvals	CEO	Finance	Dec	May
Create categorical / special revenue budgets, schoolwide plans	Finance		Mar	May
CEO approves final budgets	CEO	Finance	Dec	Jun
Final budget rollout	Finance		Dec	Jun
Load budget into fin. System	Finance		Jun	Jul
Initiate monthly budget meetings	Finance	SDs	Dec	Aug
Modify budget quarterly as needed	SDs	Finance	Dec	Ongoing
Midyear financial review	Finance	LT	Jan	Jan
Claim special ed high need reimbursements from district / state	Finance	Academics	Dec	Jun
Other Finance & Accounting			Dec	Dec
Request P-card	Finance		Apr	May
P-card training	Finance		Apr	May
Setup/update school ERP system accounts, workflows, etc	Finance		Apr	May
Train staff on use of financial system	Finance	SDs	Dec	Dec
COMPLIANCE			Dec	Dec
Update compliance calendar	Compliance	Ops	Jun	Jul
Train staff on compliance policies & procedures	Compliance		Jun	Jul
HUMAN RESOURCES			Dec	Dec
Payroll & General HR Processes			Dec	Dec
Finalize onboarding plan & train other mgmt staff	HR		Jan	Feb
Confirm budget and generate offer letters	HR	Hiring Mgrs	Jan	Jan
Confirm new hire documentation	HR		Jan	Mar
Finalize and inform mgmt staff of employee exit process	HR	Hiring Mgrs	Mar	Apr
Setup / confirm first payroll with new teachers	HR		Jun	Jul
Compensation change letters for returning staff	Hiring Mgrs	HR	Apr	May

LEAD Public Schools Start Up Plan				
Item	Owner	Involved	Start	End
New employee orientation / webinars etc	HR		Feb	Jun
Notify IT & others of final* new hire details	HR		Apr	Jun
Benefits Coordination			Dec	Dec
Develop benefits info materials for new staff & recruits	HR		Dec	Jan
All staff information uploaded to relevant info systems - rolling basis	HR		Apr	Jul
Finalize revisions to employee handbook	HR		Dec	May
Train managers and staff on handbook/policies	HR		Mar	Jul
Teacher Certification			Dec	Dec
Update teacher certification materials	HR		Feb	Mar
Preliminary review of teacher credentials to identify needs / create action plan	HR		Feb	Jun
Hold teacher credential training / info sessions as needed	HR		Mar	Aug
Confirm all teachers on-track for certification	HR	Ops	Apr	Jul
COMMUNITY ENGAGEMENT AND ENROLLMENT			Dec	Dec
Community Engagement			Dec	Dec
Assess community interest and involvement in potential schools			Dec	Dec
Initiate community engagement plan (e.g., open houses, information sessions, marketing materials, community			Dec	Dec
Identify key community partners, stakeholders and political assets			Dec	Dec
Enrollment: Policy			Dec	Dec
Initial staff training on enr policy & systems	Enrollment	SDs, Ops	Nov	Dec
Enrollment: Projections			Dec	Dec
Develop preliminary enr projections and tools	Enrollment	SDs, Ops	Dec	Dec
Review preliminary enr projections and tools	Enrollment	SDs, Ops	Jan	Jan
Submit initial enr decisions (hiring input)	SDs, Ops	Enrollment	Jan	Dec
Submit revised enr decisions (enr system input)	SDs, Ops	Enrollment	Feb	Dec
Submit final enr decisions (budget input)	SDs, Ops	Enrollment	Apr	Dec
Enrollment: Student Recruitment / Common Enrollment			Dec	Dec
Create school marketing & enr strategy, outreach plan and materials	SDs, Ops	Enrollment	Nov	Jan
Initial mailing home	Schools	Enrollment	Dec	Jan
Applications available	Enrollment		Jan	Dec
Student recruitment period	SDs, Ops	Enrollment	Jan	Feb
Door to door outreach blitz	Schools	Enrollment	Dec	Dec
Phone banking outreach	Schools	Enrollment	Dec	Dec
Enrollment fairs	Schools	Enrollment	Dec	Feb
Application deadline	Enrollment		Feb	Dec
Student assignment period	Enrollment		Feb	Mar
Offers / placements mailed out	Enrollment		Mar	Mar
Offer decisions due	Enrollment		Dec	Apr
Enrollment: Registration			Dec	Dec
End of year/Spring mailing	Enrollment	Schools	Apr	May
Plan reg day & first two weeks reg process	Ops	Enrollment	Jun	Jul

LEAD Public Schools Start Up Plan				
Item	Owner	Involved	Start	End
Schedule & conduct staff training for reg. day	Ops	Enrollment	Jul	Jul
Hold registration day	Ops	Enrollment	Jul	Jul
Facilitate and document reg day after-action review	Enrollment	Ops	Aug	Aug
Enrollment: Student Records			Dec	Dec
Office staff data mgmt training #1 (initial set-up)	Ops	Enrollment	Jul	Jul
Import all new student info into SIS	Academics	Ops	Jul	Aug
Request student cumulative files from district	Academics		Jun	Aug
Office staff data mgmt training #2 (ongoing practices)	Academics	Enrollment	Sep	Sep
Complete student withdrawal at EOY	Academics	Enrollment	Dec	Dec
SCHOOL OPERATIONS & FACILITIES			Dec	Dec
Ops Hiring & Onboarding			Dec	Dec
Launch Ops recruitment process	Ops		Oct	Nov
Finalize Ops PD schedule	Ops	SDs	Jan	Mar
Ops "Boot Camp" or training begins	Ops	SDs	Dec	Apr
Ops Job shadowing	Ops	Current Ops Staff	Apr	May
Facilities Assessment and Improvement			Dec	Dec
Engage brokers in on market and off market site search			Mar	Dec
Purchase or lease deadline			Dec	Dec
Conduct school walk-throughs for inventory, space planning and condition as	Finance	SDs, Ops	Feb	Jun
Finalize space allocation	Schools	Finance, Ops	Dec	Jun
Plan and order signage	Ops	SDs	Mar	Jun
Conduct facility scope work	Finance	Ops	May	Jul
School cleanup complete	Finance	Ops	Jul	Aug
FF&E			Dec	Dec
Create furniture menu	Ops	Ops	Feb	Mar
Place new furniture orders	Ops	SDs	Apr	May
Coordinate FFE & school materials disposal plans as needed	Ops	Ops	Mar	Jun
Nutrition and Food Service			Dec	Dec
Finalize plan / provider for nutrition services	Ops		Mar	May
Contract with HFSA, if needed	Ops		Dec	May
Set meal service schedules	Ops	SDs	May	Jun
Setup point-of-service process	Ops	IT	Jun	Jul
Ascertain directly certified students	Ops		Jul	Jul
Apps gathered for students	Ops		Jul	Aug
Ensure elig updated in in POS or other system	Ops		Jul	Aug
Complete snack application	Ops		Jul	Aug
Train school office staff on processes	Ops		Jul	Jul
Ensure periodic checks for billing and payment from students	Ops		Aug	Ongoing
Transportation				
ID preliminary bus schedules	Ops		Apr	Jun
Conduct planning meetings with transportation providers	Ops		Dec	Jul

LEAD Public Schools Start Up Plan				
Item	Owner	Involved	Start	End
Finalize Routes	Ops			Jul
Communicate routes to families- mailers, school events	Ops		Jul	Aug
Security			Dec	Dec
New building security review & planning	Ops		Mar	May
Coordinate security access for school staff: codes, badges, etc	Ops	SDs	May	Jul
Set security service contract; create schedule	Ops		Apr	Jun
Develop, submit and train staff on school safety plan / emergency managemen	Ops	SDs	Dec	Aug
Health Services			Dec	Dec
Finalize nursing plan: update contract or hire school nurse	Ops	SDs	Apr	Jun
Review student health information and develop action plans	Nurse		Jul	Aug
Send home information regarding necessary immunization and other steps	Nurse	Ops	Dec	Aug
Office Administration			Dec	Dec
Hire office staff	Ops	SDs	Apr	Jun
Organize / setup new front offices	OMs	Ops	May	Jun
Setup & communicate front office coverage schedules for summer	Ops		May	Jun
Review and reorganize student files	OMs	Ops	Jun	Jul
Update other routine documents -- permission slips, notifications, call-em-all system, etc			Dec	Dec
School Procurement			Dec	Dec
Complete inventory of books, curriculum, and classroom / office materials.	Ops	SDs, Teachers	Jun	Jul
Gather requests from returning and newly hired staff	Ops	SDs, Teachers	Apr	Jun
Order curriculum, classroom, office and school supplies and materials	Ops		Apr	Jul
TECHNOLOGY			Dec	Dec
Technology Closeout			Dec	Dec
Collect equipment from departing staff	Ops	IT	Dec	May
Re-image existing laptops and check for damage	IT		Dec	June
School year backup and server cleanup	IT		Dec	June
Secure existing A/V and other equipment and check for damage	Ops	IT	Dec	June
E-rate			Dec	Dec
Select Services and Estimate Costs	IT		Oct	Jan
File for current year funding (Form 471)	IT		Jan	Feb
Complete all necessary applications (E.g., 486, 474, 472.)	IT		Dec	Varies
Determine e-rate needs / Bid Form 470 for following year	IT		July	Sept
Network Infrastructure			Dec	Dec
Assess existing network infrastructure	IT		Feb	May
Reconfigure school telecom system	IT		May	July
Configure Filter, Firewall, AD, etc.	IT		May	July
Deploy Network equipment	IT		May	June
Network Testing	IT		May	July
Technology Procurement & Startup			Dec	Dec

LEAD Public Schools Start Up Plan				
Item	Owner	Involved	Start	End
Prep / conduct bids as needed	IT	Ops	Jan	Feb
Initial review of school needs (e.g., Hardware, Software, Network Configuration)	IT	Ops, SDs	Dec	March
Get list of existing assets from district (e.g., Networking, Physical Assets)	IT	Ops	Feb	March
Complete existing IT inventory; finalize disposal plans with district	IT	Ops	March	June
Place computer orders	Ops	IT	March	April
Finalize tech support plan: hire staffing and/or update vendor contracts	IT	Ops	March	June
Specified excess inventory to be removed by district	Ops	IT	May	June
Staff devices arrive	IT	Ops	Dec	Early June
Teacher computers imaged and ready for deployment	IT	IT	Dec	Late July
Student devices arrive	IT	Ops	Dec	July
Procure and setup copy / office machines	IT	Ops	April	June
Identify and procure inventory needed for consumables (e.g., projector bulbs)	Ops	IT	Dec	June
Order A/V and other equipment (e.g., projectors, printers, doc cams, carts, software)	IT	Ops	April	July
Equipment inventoried, labeled / asset-tagged	Ops	IT	May	June
Compliance and Policies Review	IT	Ops	June	July
Deploy A/V & other equipment (e.g., hang projectors)	Ops	IT	June	August



LEAD Public Schools Application: LEAD Southeast Elementary

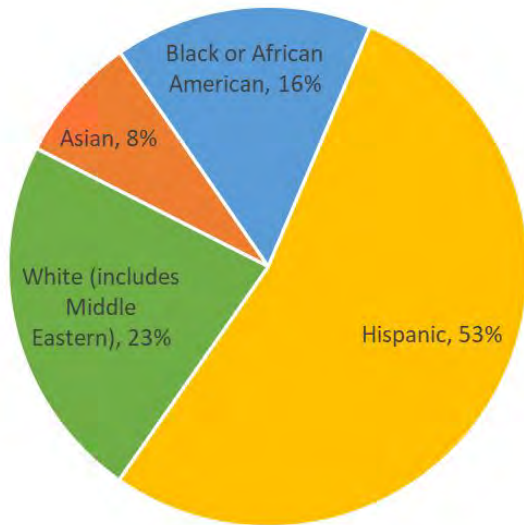
LEAD's Commitment to Nashville

- **Our Mission:** Prepare all of our students with the knowledge and skills to succeed in college and in life.
- **Our History:** Starting in 2007, as a single school of 92 students in North Nashville, we now serve more than 2400 students in Nashville.
- **Our Commitment:** 15 years of commitment to the students of Nashville, as the largest home-grown charter organization

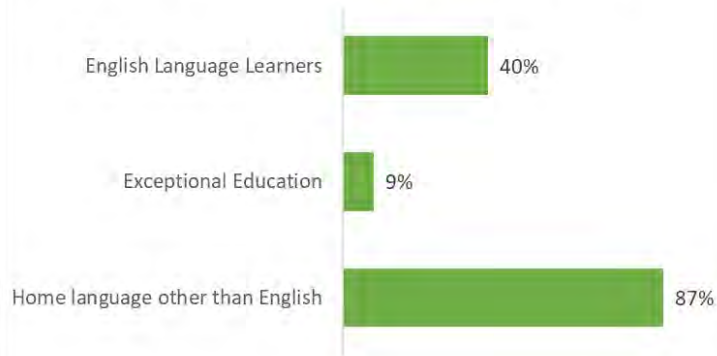


Our LEAD Southeast Community is vibrant and diverse

LEAD Southeast Middle Student Demographics:
Race/Ethnicity

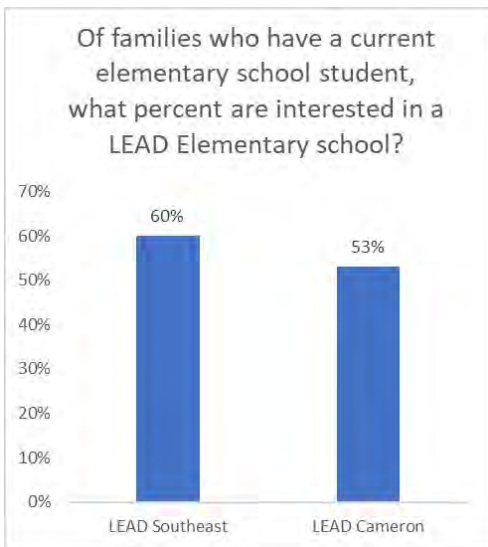


LEAD Southeast Middle Student Demographics

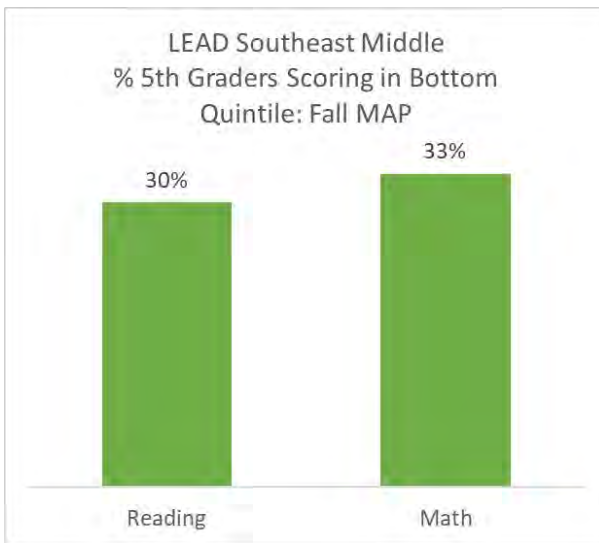


Why Elementary?

LEAD Families desire an elementary option within the LEAD community: More than 200 LEAD families are interested in enrolling their children in a future LEAD elementary school for a K-12 continuum



Improve the level of preparedness for LEAD Middle Schools: 5th graders entering LEAD are much more likely to be in the bottom 20th percentile on MAP than expected. A LEAD elementary option will ensure students are better prepared to enter middle school.



Aligns with MNPS ReimaginED: LEAD elementary schools will meet the needs of a growing city for new school capacity and provide high-quality seats



Proven Dedicated Elementary School Launch Team



Dr. Ricki Gibbs,
Elementary Head of Schools
19 Years of Experience



Stephanie Cummings,
Elementary School Principal
21 Years of Experience



Justice Riddle,
Dir Elementary Literacy
15 Years of experience



Ashley Wickiewicz, BCBA,
Director of Elementary
Student Services
10 Years of experience

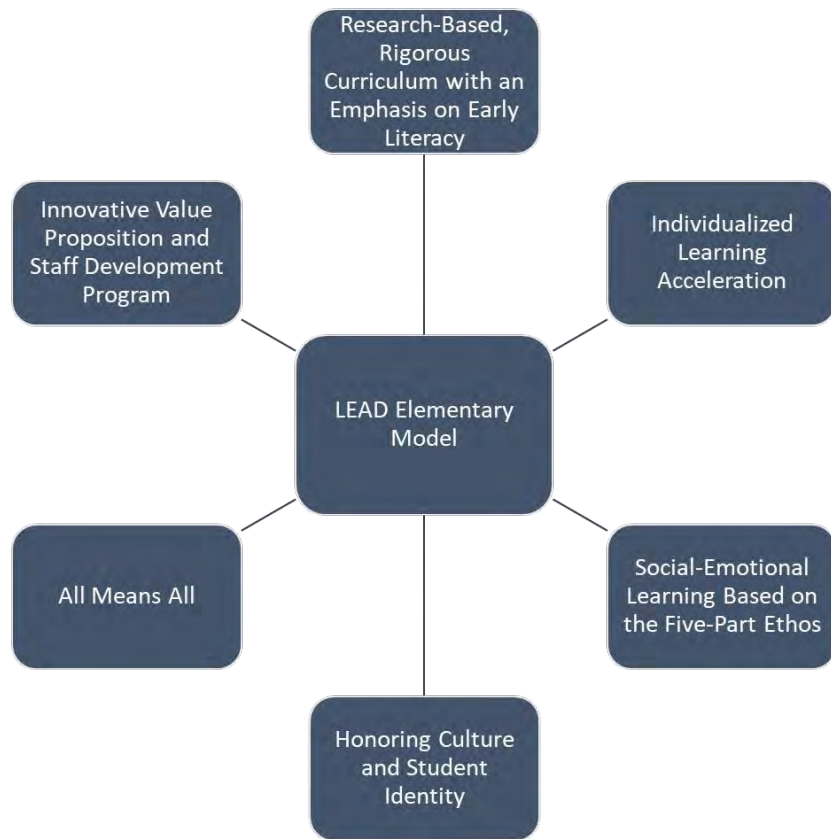


Dr. Jamie Jenkins,
Asst Principal of Students, Elem
16 Years of Experience



Dr. Carlos Comer,
Asst Principal of Instruction, Elem
26 Years of Experience

LEAD Elementary Model



Track Record of Results at LEAD Southeast

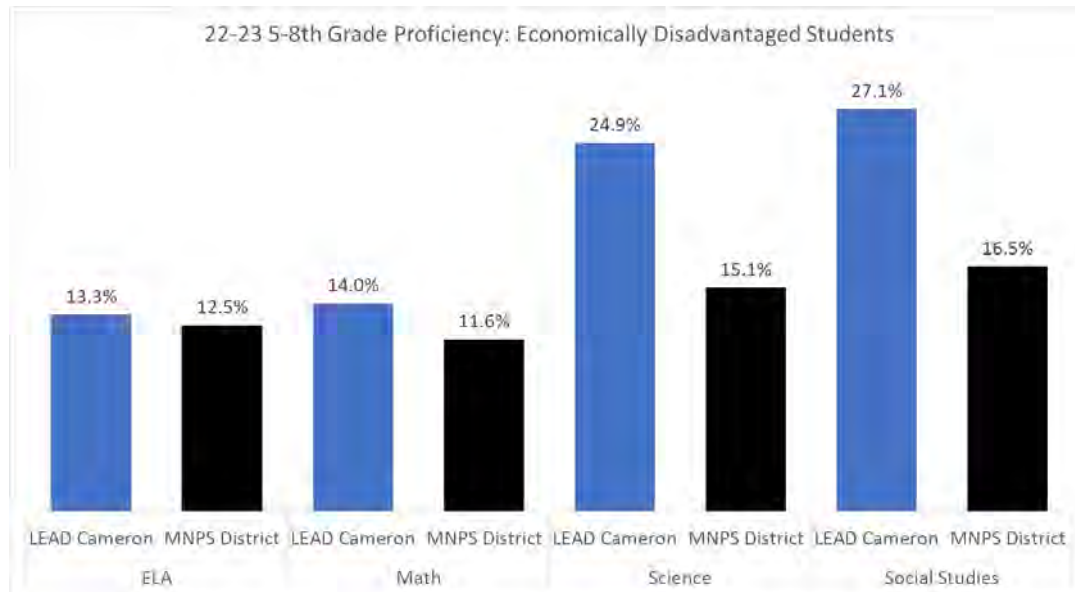
LEAD schools are reliably growing students

LEAD schools are proving the possible for low-income students

TVAAS Results



Proficiency Results for Economically Disadvantaged Students



*Data based on 2023 District Level and School Level Assessment Results

<https://www.tn.gov/education/districts/federal-programs-and-oversight/data/data-downloads.html>



Strong Launch

- Operational expertise and plan to successfully open charter schools
- Financial resources ready to invest in school start up
- Experienced leadership and board of directors



Statement of Financial Position (12/31/23)		
Current Assets	\$	24,518,645
Property & Equipment	\$	8,833,598
Total Assets	\$	33,352,243
Current Liabilities	\$	4,280,978
Long Term Liabilities	\$	273,730
Net Assets	\$	28,797,535
Total Liabilities & Equity	\$	33,352,243



Thank you

NN. Capacity Interview Presentation





LEAD Leadership Development Plan (2019-2025)

Where We Have Been (2019- 2021): Leadership and Talent Foundation

July 2019, marked the beginning of a multi-year integrated leadership and talent strategy grounded in the same Ethos that has guided our student outcomes since our founding. Our classroom teachers create an environment where students are ready to learn and we created an environment where our teachers and staff are ready to lead.

The leadership Ethos for teachers and staff aligns with the categories of our student Ethos. I am **Committed** - I exemplify LEAD Public School's vision and mission – every student is ready for college, ready for life. I am **Courageous**- I have the drive to be better and am vulnerable and brave enough to get there. I am **Disciplined** - I am consistently clear, focused, and driven. I am **Self-Reliant** - I take charge of my own life and am responsible for my choices. I **Serve Others** - I put the needs of others first, help teammates optimize performance, and learn from others. **Leader of Others** - I *coach* for optimal performance and invest in the growth and development of others.

Our CEO and leadership team modeled the way in 2019 committing to focused leadership development. The leadership development program allows each leader to fully understand and leverage their authentic leadership style and build a customized development plan. The program includes assessments, 360-degree feedback, and executive coaching.

Leadership Development

Assessments help leaders understand and articulate their unique and authentic leadership style. The primary assessment used is called MAI Positive Core™, which combines the results of four highly respected assessment tools to create a comprehensive and actionable picture of individual and team strengths, leverage points, gaps, and targeted areas for development. The four assessments include:

- **Emergenetics Assessment** - The assessment provides clear insights into preferred thinking styles and behavior preferences which are used to increase individual effectiveness and expanded capacity in working with others.
- **VIA-IS: Signature Strengths Assessment** - The Values in Action Inventory of Strengths (VIA-IS) is a self-report questionnaire that measures 24 strengths of character organized under six core virtues. The VIA reports identify the respondent's signature values.
- **Strengths Finder 2.0** – Rooted in more than 40 years of research, this assessment has helped millions discover and develop their natural talents. The results provide a stack ranking of the respondent's signature talents.
- **Kolbe** – The Kolbe A Index measures a person's instinctive method of operation (MO); how a person takes action and solves problems; identifies the ways he or she will be most productive.
- One additional assessment is included in the Leadership Development program, the **Thomas Kilmann Conflict Mode Instrument (TKI)**. The TKI assists in understanding your preferred conflict mode, five conflict resolution approaches, and expanded tools for resolving conflict.

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2. Genuine curiosity, embodied in active and reflective listening. The coach uses a combination of powerful questions and reflections to gain a shared understanding of the client's viewpoint. This exploration allows the client to deeply reflect on their beliefs and actions, gaining clarity, and insight and invoking the client's own curiosity to explore different perspectives and alternate courses of action.
3. Resisting what Motivational Interviewing founder William Miller, Ph.D. refers to as "the righting reflex" or the desire to set things right and put people on the right path (Miller, 2002). Essentially this is telling them what to do, and while done with the best of intentions, it often activates the person to do the opposite. Instead, we evoke the client's motivation and emphasize their autonomy in making change.

As a result of the assessment, feedback, and focused coaching; the leader expands understanding, achieves higher levels of focus and results, and builds a solid foundation for future success.

The focused approach to leadership development has cascaded to each leadership level in the organization.

Employer of Choice

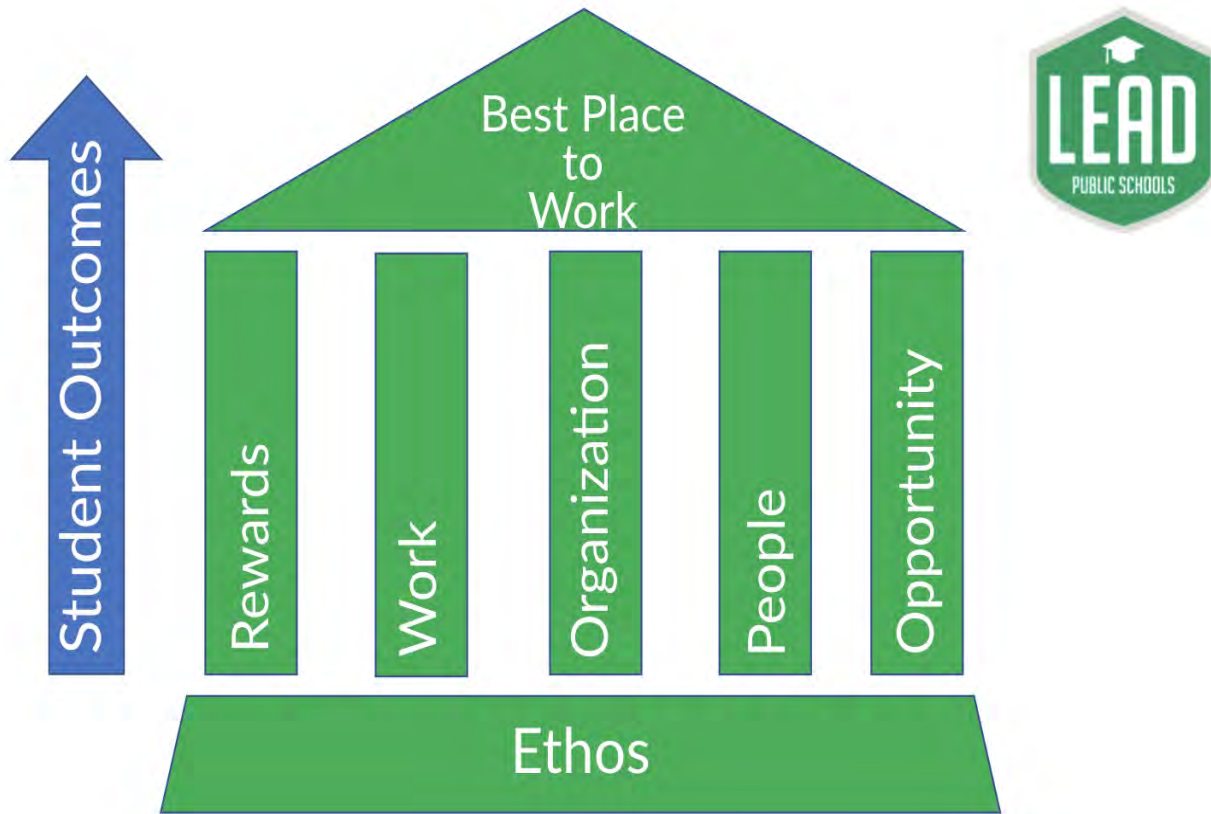
We crafted a multi-year strategy to become an Employer of Choice with an integrated approach to talent management:

1. **Talent attraction and selection** – sourcing, selecting, and onboarding the right people for the right roles at the right time.
2. **Managing performance and developing talent** – engaging each member of the team, focusing on performance, quality conversations, and coaching to build skills and capabilities
3. **Employee value proposition** – compensation strategy as part of a complete employee value proposition unique to the organization including rewards, work, organization, people, and opportunity.
4. **Building organizational capacity and capability** – organization structure, role definition with linked and clear accountabilities, effective teams, and solid Human Resource administration.

Employee Value Proposition

We articulated and integrated an employee value proposition unique to LEAD in all components of our talent management strategy. **Opportunity** includes development opportunities and professional growth. **Work** includes alignment between individual interests and work content as well as work-life balance. **People** include quality of coworker relationships, quality of leadership, and the team. **The organization** includes mission purpose and reputation. **Rewards** include compensation, benefits, and paid time off.

The employee value proposition serves as a guide for investments in our culture and provides the framework for communicating our employer of choice commitment.



Performance Coaching and Talent Development

A simple focused Performance Management process was implemented. Consistent frequency and quality of performance coaching discussions create an environment where talent thrives. Awareness of brain-based implicit or unconscious bias combined with additional skills in preparing for and practicing "courageous" conversations, listening to several levels, and coaching can collectively and significantly impact the quality of performance coaching. LEAD Performance Management:

1. Creates a framework, tools, and commitment to align employees to organizational priorities and clarify accountability for performance results
2. Enables the ability to differentiate and reward performance
3. Promotes and builds on successful cultural attributes – Ethos and leadership behaviors
4. Expands capability and capacity to attract and hire qualified talent
5. Grows leaders who successfully engage employees, provide coaching and development, get work done with and through others, and achieve high levels of performance

Performance Management training is provided for all people leaders aligned to an ongoing cycle:

Performance Management Cycle



Talent Calibration and Succession Planning

Beginning with the role of CEO and continuing to the role of Principal, an annual talent calibration and succession plan is completed for each leadership role. Each leader is evaluated to identify core strengths as well as areas for focused development. The evaluation is a multi-dimensional view of leadership success at LEAD.

Leaders periodically receive 360° feedback on the frequency of display of behaviors aligned to our Ethos. This forms the basis for the evaluation of leadership behaviors. Specific leadership competencies have been identified for key leadership roles. Finally, all leaders commit to a common set of leadership tasks grounded in decades of research on leadership success (Kouzes and Posner – The Leadership Challenge).

This approach to talent assessment and calibration clarifies succession readiness, creates multiple career pathways, informs development planning, and results in a more robust talent pipeline. The process involves readiness assessment with target plans to close the gap in achieving ready now status.

Behaviors	Competencies	Tasks
Committed	Collaboration & Influence	Model the Way
Courageous	Managing Complexity	Inspire a Shared Vision
Disciplined	Resolving Conflict	Challenge the Process
Self-Reliant	Developing Others	Enable Others to Act
Serve Others		Encourage the Heart
Leader of Others		

Talent Acquisition

Staff and leaders involved in talent attraction and selection have been trained in hiring for fit.

Components of Hiring for Cultural Fit



Background and skill review

- Review job history, responsibilities, and accomplishments including reasons for leaving and gaps in employment
- Review education, training, certifications, etc.
- Explore skills, abilities, likes, dislikes, and what the candidate is looking for

Behavior-based interview

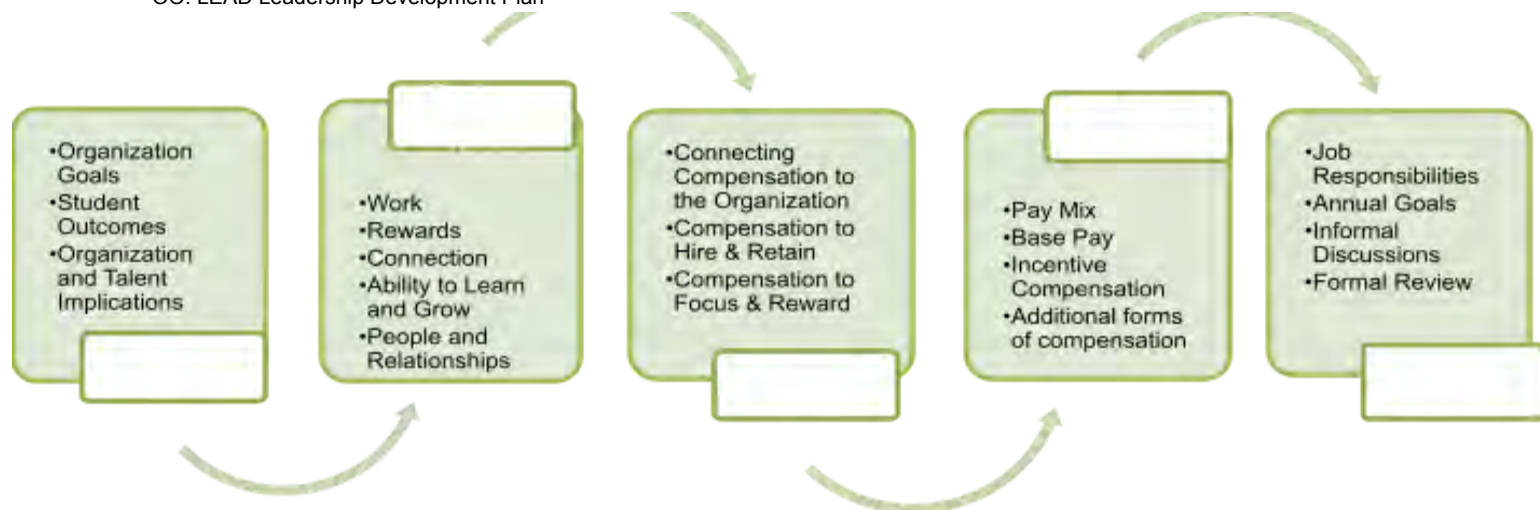
- Interview for the attributes that predict success in the role
- Ask about specific situations - past behavior is a predictor of future behavior
- Explore situation - action taken - the result of actions - what candidate learned
- Listen for information relevant to the defined competencies/attributes and the definition of success

Motivation and cultural fit

- Review candidate's interests and motivations
- Explore conditions where candidates have done their best work
- Get to know the candidate – potential and performance

Compensation Plan

Unique compensation plans were created for teachers and staff. As part of an integrated design, the compensation plan supports and rewards performance results and student outcomes.



Where We Are Now (2022): Student Outcomes at Scale

To achieve student outcomes as scale we are implementing a school-based leadership model and leadership development pathways. Our school LEADership structure was designed to achieve the following:

1. **K-12 Network** - To grow to be a K-12 network and to create a sustainable future for our LEAD community.
2. **The Path to Sustainability** - To build organizational capacity and capability for sustainable growth.
3. **Enhanced Leader Development** - To enhance individual performance and career development conversations.
4. **Consistent LEADership Model** - To implement a more consistent leadership model with leadership behaviors grounded in the LEAD Ethos.
5. **LEADership Pathways** - With our talent calibration initiative, we assessed our network's leadership, and began to build a process for evaluating, intentionally developing, and supporting high-potential individuals with executive coaching, training, and support. These changes began with our school-based leaders, now we are expanding this to develop additional leadership pathways.

A scalable structure of leadership begins with a newly created role of Instructional Leader. Each classroom teacher will have a direct leader invested in coaching and development for student outcomes. Instructional Leaders will be guided by the Assistant Principal of Instruction and supported by the Assistant Principal of Students. Each school will be led by a Principal - leading in the community, leading their school, and collaborating across the network.

In July of 2022, more than 50 leaders will gather for LEAD U. Each participant will leave LEAD U with expanded insights on leading by **looking up** (putting the work at hand in the context of the broader organization and community served), **looking out** (focusing on the current within the context of the long term), and **looking across** (identifying opportunities for collaboration and partnership – linking and aligning resources and output)

Leaders will leave LEAD U with a grounded optimism in their ability to lead and engage their team – knowing that they have unique skills and talents to lead in an authentic way AND access to support in resources within LEAD and their Authentic Impact Coach.

The tools are similar – but they are being delivered at LEAD U in a way most aligned to the Leaders' area of focus and impact. The sessions are designed to bring the groups together while also providing time for targeted development within leadership peer groups.

We will be developing a group of recently promoted internal leaders (33 Instructional Leaders, 8 Assistant Principals of Instruction, and 4 Principals). We invest in developing internal talent to fill leadership roles and then equip them with leadership training and support. Each newly placed leader will participate in a 6-month leadership development process – applying leadership development to the highest priority school outcomes.

Leadership Development – Newly Placed Leaders

Assessments help leaders understand and articulate their unique and authentic leadership style. The primary assessment used is called MAI Positive Core™, which combines the results of four highly respected assessment tools to create a comprehensive and actionable picture of individual and team strengths, leverage points, gaps, and targeted areas for development. The four assessments include:

- **Emergenetics Assessment** - The assessment provides clear insights into preferred thinking styles and behavior preferences which are used to increase individual effectiveness and expanded capacity in working with others.
- **VIA-IS: Signature Strengths Assessment** - The Values in Action Inventory of Strengths (VIA-IS) is a self-report questionnaire that measures 24 strengths of character organized under six core virtues. The VIA reports identify the respondent's signature values.
- **Strengths Finder 2.0** – Rooted in more than 40 years of research, this assessment has helped millions discover and develop their natural talents. The results provide a stack ranking of the respondent's signature talents.
- **Kolbe** – The Kolbe A Index measures a person's instinctive method of operation (MO); how a person takes action and solves problems; identifies the ways he or she will be most productive.
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Where We Are Headed (2023-2025): Ready for Growth

Entering the calendar year 2023 we will have a leadership cadre of 50+ professionals leading the organization in a model that continues to build the pipeline of talent and allows LEAD to scale. We will utilize the leadership development pathways to focus on the development of leaders at each level of school leadership expanding our pool of resources for future growth.

Each July we will customize and deliver LEAD U to prepare leaders for the unique priorities of the coming year. LEAD U has evolved to be a key part of our approach to developing and preparing leaders and aligning across our growing network.

We will expand our talent calibration and succession planning down through the Instructional Leader role including assessment and development planning for the classroom teacher. We have created a system that supports talented teachers who wish to have a career in the classroom. No longer must our teachers leave the classroom to advance their pay. Utilizing the integrated set of talent management tools that have been designed, implemented, and refined since 2019 we have built a pipeline for talent and de-risked the talent component of our growth plans.

We will continue to follow a proven playbook and set of tools. We continue to invest in process of organizational sustainability, stimulating progress through innovation while preserving the core of LEAD. Increasingly roles are filled with ready-now internal talent while infusing the organization with targeted external talent. Externally hired talent is attracted and selected for cultural fit impacting success in the role and enhancing the organizational culture that delivers reliable student outcomes.

Multi-Year Integrated Plan in Summary

2019	2020	2021
▪ LEAD U – leadership university for leaders before the school year ▪ Defined Employee Value Proposition ▪ Teacher Compensation Plan ✓ Performance-focused opportunity to rapidly advance base pay ▪ Leadership Behaviors defined and aligned to Ethos ▪ Leadership Development ✓ Assessment ✓ 360° Feedback ✓ Executive Coaching ▪ Crucial Conversations Training	▪ LEAD U – leadership university for leaders before the school year ▪ Evolve teacher compensation plan including the elimination of stipends approach to pay ▪ Performance-based compensation plan for non-teachers ▪ Performance Management program integrating Ethos based leadership behaviors ▪ Continued investment in deepening skills for effective communication and crucial conversations ▪ Ongoing leadership development for senior leaders ✓ Leading Change ✓ Developing Talent ▪ Extended Leadership Development through Assistant Principal and Dean ✓ Assessment ✓ 360° Feedback ✓ Executive Coaching	▪ LEAD U – leadership university for leaders before the school year ▪ Succession Planning ✓ Principal thru CEO ▪ Talent review and calibration ✓ Talent as an asset of the network ▪ Core competencies and leadership pathways ✓ Assistant Principal, Dean, Operations Manager, Principal ▪ Training Plan ✓ Customize ADP modules ✓ Custom build modules ✓ Aligned to key roles and leadership pathways ▪ Hire for Culture Fit & Ethos Alignment ✓ Tools & Training ✓ Candidate sourcing and selection ▪ Leadership Development for newly hired leaders ✓ Assessment ✓ 360° Feedback

		✓ Executive Coaching ▪ Individualized leadership development for senior leaders aligned to the Succession and Development Planning Process

2022	2023	2024/2025
▪ LEAD U – leadership university for leaders before the school year. For 2022/2023 the largest leadership group assembled. 50+ leaders participating in integrated learning delivered to three targeted levels of leaders ▪ Enhanced teacher compensation plan with an additional \$500K investment for increased starting pay, raising maximum to \$100K for Master Teachers and \$75K for teachers ▪ Enhanced non-teacher compensation plan to 75th percentile market-based midpoints and a 5% merit budget. ▪ Designed a new school-based leadership structure ▪ Implemented leadership pathways and development plans	▪ LEAD U – leadership university for leaders before the school year ▪ Implement new school leadership structure for 2022/2023 school – Instructional Managers providing coaching and leadership for classroom teachers while building leadership skills in a multi-level pipeline of leadership talent ▪ Build leadership pipeline and deepen leadership expertise to prepare for network growth – ready now for school growth ▪ Leadership Development for newly hired leaders ✓ Assessment ✓ 360° Feedback ✓ Executive Coaching ▪ Individualized leadership development for senior leaders	▪ LEAD U – leadership university for leaders before the school year ▪ Leadership Development for newly hired leaders ✓ Assessment ✓ 360° Feedback ✓ Executive Coaching ▪ Individualized leadership development for senior leaders aligned to the Succession and Development Planning Process ▪ Succession plans show talent depth for all leadership roles ▪ LEAD leaders are impacting student outcomes at an expanded LEAD and in school systems across the United States ▪ LEAD is an Employer of Choice in Nashville

▪ Focus on developing internal leaders with high rates of internal promotion. 100% of Principal hires for the 2022/2023 school year to be an internal promotion ▪ Leadership Development for newly hired leaders ✓ Assessment ✓ 360° Feedback ✓ Executive Coaching ▪ Individualized leadership development for senior leaders aligned to the Succession and Development Planning Process ▪ Focused talent acquisition with a differentiated employee value proposition – attracting ethos-aligned talent with growth potential	aligned to the Succession and Development Planning Process ▪ Deepened pools of talent for critical roles ▪ Achieving target retention rates of high-performing teachers and staff while achieving a reputation as talent developers	



Ashten Fransioli <ashten.fransioli@leadpublicschools.org>

Fwd: LEAD Southeast ES New Start Application Board Decision

Adrienne Useted <adrienne.useted@leadpublicschools.org>
To: Ashten Fransioli <ashten.fransioli@leadpublicschools.org>

Tue, May 21, 2024 at 11:56 AM

----- Forwarded message -----

From: **Adrienne Useted** <adrienne.useted@leadpublicschools.org>

Date: Fri, Apr 26, 2024 at 8:55 AM

Subject: Re: LEAD Southeast ES New Start Application Board Decision

To: Charter School Office <CharterSchoolOffice@mnps.org>, Dwayne Tucker <dwayne.tucker@leadpublicschools.org>

Cc: Roby-Grant, Shereka D <Shereka.Roby@mnps.org>, Leslie, Amy <Amy.Leslie@mnps.org>, Crawford, Steven B <Steven.Crawford@mnps.org>, Perry, Renita F <Renita.Perry@mnps.org>, Charter Schools <Charter.Schools@tn.gov>

Hello all, thank you for your review of LEAD Southeast Elementary. This email confirms receipt of the memo and next steps attached.

Upon review of both the final board report and new start notification, we want to draw your attention to a significant discrepancy in the Section 4: Portfolio Summary/Performance Record. It appears that the findings from our other charter application, LEAD Cameron Elementary, was substituted in our LEAD Southeast Elementary final report. The MNPS report details information related to the performance of LEAD Cameron Middle, which is not included anywhere in our LEAD Southeast Elementary school application. Instead, you will see on our LEAD Southeast Elementary application on pages 202-206, we detail the performance of LEAD Southeast Middle School. We are requesting that MNPS correct the record to reflect the information contained within the LEAD Southeast Elementary application and so that we may amend the appropriate information, if necessary, before the next board review.

Please let me know should you have any questions. Thank you.

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